

## Asset Management Unit Work / Action Plan to 2020 Appendix A

The Property Asset Management Strategy (PAMS) is intended to set out our objectives, policy and procedures in managing our land and premises and how we will work with others across our area so that we can:

- Continue to challenge whether we are delivering value for money, especially at a time when budgets are becoming constrained due to the general economic conditions prevailing
- Decide upon our future needs for land and buildings in delivering services
- Improve the experience of those using our services by accessing our premises.

To make sure the PAMS is fit for purpose, adequately reflecting the current and future environment within which we deliver our services; we have identified the following programme of work to help improve the way we manage our assets and work with others in delivering improvements; that benefit the individuals, communities and neighbourhoods we serve and work alongside.

Objective / Outcome Focus	Tasks to meet objective	Actions to complete tasks	Target date	Responsible	Accountable	Consulted	Informed
<b>1: Make sure the Property Asset Management Strategy remains current and relevant.</b>	<b>1.1: Review annually the PAMS and our approach to asset and estate management to reflect priorities and best practice.</b>	Programme the annual review of the PAMS to be in line with the budget setting process.	January each year	PAM ESTM	DBS ARM	CPM PHAM	CAB CO&S
		Review and if necessary redraft PAMS each year to reflect: <ul style="list-style-type: none"> <li>▪ Changes in legislation and Council policy</li> <li>▪ Improvements made in our own working practices</li> <li>▪ Medium Term Financial Plan and annual budgets</li> </ul>	Sept - Nov each year	PAM ESTM	DBS ARM	CPM PHAM	CAB CO&S
<b>2: Member and Senior Officer development to make sure our asset and estate management policy and strategy development is well informed and effective.</b>	<b>2.1: AMU to work more closely, on developing and improving our corporate asset and estate management strategy, with:</b> <ul style="list-style-type: none"> <li>▪ Cabinet;</li> <li>▪ Portfolio holder for Asset Management;</li> <li>▪ Scrutiny Members</li> <li>▪ DT</li> <li>▪ Corporate Premises Managers and</li> <li>▪ Strategic partners</li> </ul>	Provide regular briefings to Portfolio Holders for effective asset management on current good practice in asset management	Regular intervals	PAM	ARM	DBS CO&S CPM	DT
		Provide regular update reports for Scrutiny Committee and DT review. [links to improving data quality objective (5)]	As applicable to update on the action plan progress	ARM ESTM PAM	DBS ARM	DT CO&S	
<b>3. Make sure the PAMS:</b> <ul style="list-style-type: none"> <li>▪ Sets out the aims of the Council and</li> <li>▪ Reflects the views of our internal and external</li> </ul>	<b>3.1 Carry out external stakeholder (public sector bodies) consultation on PAMS priorities.</b>	Identify all relevant public sector owners of assets and those that access our services.	2017	ESTM	DBS ARM	PHAM DT LSP PGO	CO&S
		Map and review other public sector property assets across the area with partners.	2017	ESTM	DBS ARM	PHAM DT LSP PGO	CO&S

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<p>Stakeholders, through consultation on priorities and establishing stronger working links with our partners;</p> <ul style="list-style-type: none"> <li>Especially in strengthening the challenge process to asset management.</li> <li>Is developed to incorporate a strategic approach toward collaboration; and identifies potential opportunities for sharing the use of assets.</li> </ul>	<p><b>3.2</b> Work more closely with the Third sector to improve community based projects and asset utilisation.</p>	<p>Work with the Third Sector to:</p> <ul style="list-style-type: none"> <li>collate information on all agencies and funding groups supporting the 3rd sector and improve understanding of their needs and aspirations</li> <li>identify opportunities for the transfer of existing Council assets to community ownership and management</li> </ul>	Ongoing	ARM	DBS	<p>PHAM CVA DT CPM AMU</p> <p>CAT Panel</p>	CAB
		<p><b>4.</b> Improve the performance of our own property assets.</p>	<p><b>4.1</b> Make sure we have a robust programme for challenging our use of assets.</p> <p>[Links to AMS annual review objective (1)]</p>	<p>Review and update, where necessary, our current:</p> <ul style="list-style-type: none"> <li>process for challenging our use of assets</li> <li>schedule of assets to be challenged</li> <li>procedures for identifying surplus assets</li> </ul>	Ongoing	PAM ESTM	ARM
<p><b>4.2</b> Identify individual service priorities and needs from the land and buildings they use in delivering services.</p>	<p>Hold six monthly meetings with key operational premise managers</p>		Ongoing	PAM	ARM	CPM AMU	DT
<p><b>4.3</b> Establish policies and procedures to guide services in the direct management of our operational assets.</p>	<p>Develop a procedure manual relating to asset/property management practice.</p> <p>Will benefit from EDRM system being in place.</p>		Ongoing	PAM	ARM	<p>DT CPM PPM</p>	<p>PHAM CO&amp;S</p>
<p>Provide training days and materials for premise managers.</p>	<p>Provide training days and materials for premise managers.</p>		Ongoing	PAM	ARM	CPM AMU	<p>PHAM CO&amp;S</p>
<p><b>4.4</b> Collect data to make sure that the cost of occupying property can be compared against the benefits or outcomes being delivered; in order to assess whether our operational assets justify their keep and, or, are surplus to requirement.</p>	<p>Detail the size, use, tenure and an assessment of the fit for purpose of each of our operational assets.</p>		Ongoing (will be a couple of year process).	PAM	ARM	<p>DT CPM AMU</p>	<p>PHAM DBS CO&amp;S</p>

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	[Links to (4.1)]	Produce an analysis of: <ul style="list-style-type: none"> <li>• Space utilisation</li> <li>• Surplus capacity</li> <li>• Un-used and under used property</li> </ul>	Start December 2016 (may be dependent on new IT software)	PAM ESTM	ARM	DT CPM AMU	PHAM DBS CO&S
	<b>4.5</b> Agree annual demolition programme to provide savings on business rates and clear sites with derelict buildings, health and safety hazard.	Identify buildings for demolition and carry out relevant consultation.	Ongoing	PAM ESTM	ARM	DT CPM AMU	PHAM CO&S
	<b>4.6</b> Understand the value of our asset maintenance backlog.	Continue the 5 year rolling programme of condition surveys for all operational properties. [links to improving data quality objective (5)]	Ongoing	PAM	ARM	CPM AMU	DBS PHAM CO&S
	<b>4.7</b> Assess whether investment assets and estate justify their retention.	<ul style="list-style-type: none"> <li>▪ List of all our commercial / tenanted non residential properties (TNRP) and their type e.g offices or retail</li> <li>▪ Individual asset values</li> <li>▪ Income from each asset</li> <li>▪ Reason we hold the asset e.g investment, income stream, socio-economic</li> </ul> Assess their suitability, condition and running costs	Start June 2016	ESTM	DBS ARM	PHAM PGO	DT CO&S
		Identify and evaluate the costs and benefits of all possible options for our TNRP e.g. retaining, disposing by sale or transfer	Start June 2016	ESTM PAM	DBS ARM	PHAM PGO	DT CO&S
<b>5.</b> Improve the quality of the data we use to: <ul style="list-style-type: none"> <li>▪ assess the efficiency and effectiveness of our use of offices, other premises and land; and</li> </ul>	<b>5.1</b> Develop Technology 1 Finance, Asset and Property Management system to improve our data and reporting.	Align financial with performance information for assessing how well we are managing our assets.	Ongoing	ARM	DBS ARM	PPM AMU	DT PHAM CAB CO&S
		Implement a new Terrier software system.	Started Dec 2015 and ongoing	ARM ESTM	DBS ARM	Tech1 AMU	DT PHAM CO&S

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<ul style="list-style-type: none"> <li>to inform our PAMS strategic decisions. [Links to improving the performance of our assets objective (4) and to the annual review of PAMS objective (1)]</li> </ul>	<p><b>5.2</b> To help inform our decision making: determine a relevant and robust set of performance indicators that meet the SMARTER criteria:</p> <p>Specific Measurable Agreed Relevant / Realistic Time-bound Evaluated Reviewed</p>	<p>Review the current asset management PIs we use and:</p> <ul style="list-style-type: none"> <li>identify a new set relevant to our needs</li> <li>introduce and maintain a framework for collecting and reporting key indicators.</li> </ul>	Complete but continual review process.	PAM ESTM	DBS ARM	DT CPM PGO AMU	PHAM CO&S
<p><b>6.</b> Agree annual disposals programme as part of the business planning and budget process.</p>	<p><b>6.1</b> Review our Asset Disposal Framework to make sure it is a streamlined process and links clearly to our disposal strategy, especially by incorporating our approach to the transfer of assets to community ownership and management.</p>	Review the disposal framework.	January 2017	PAM ESTM	ARM	DBS PHAM AMU	DT CAB CO&S
	<p><b>6.2</b> Continue to work closely with Regeneration Services to identify opportunities for regeneration of Council owned property assets. [ Links to improving the performance of our own assets objective (4) ]</p>	Work together to identify best ways to improve Council buildings.	Ongoing	PAM ESTM	ARM	DBS PHAM AMU DT	CAB CO&S
	<p><b>6.3</b> Identify properties suitable for transfer to community ownership and management. [ links to working more closely with the 3rd Sector objective (3.2) ]</p>	Work closely with the Partnerships and Sustainable Communities Manager and Community Asset Transfer Panel.	Ongoing	ARM	DBS	DT CPM	CAB CO&S
<p><b>7.</b> Improved levels of customer satisfaction</p>	<p><b>7.1</b> Identify client groups and build relationships with Premise Managers to gain a better understanding of the operational needs for their premises. e.g:</p> <ul style="list-style-type: none"> <li>council departments;</li> <li>TNRP (tenants of non-residential properties)</li> <li>Partners.</li> </ul>	Survey tenants of non residential properties (TNRP) to identify areas of strength and weakness to improve customer satisfaction.	Start April 2017 On a phased basis	ESTM	ARM	PHAM TNRP	CO&S DBS
		Develop customer service standards for the AMU on asset, operational and TNRP commercial estate management.	Start April 2016	PAM ESTM	ARM	AMU CPM PHAM Partn	DT
		Survey of premise managers to identify areas of strength and weakness to improve customer satisfaction.	Start April 2016	PAM	ARM	CPM	DT CAB CO&S

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portfolio by developing a strategy for managing the environmental performance of our buildings; especially improving the energy efficiency of our properties and thereby deliver savings.	<b>8.1</b> The Council's current expenditure across utilities is approximately £900k.	Identify and introduce schemes aimed at reducing our carbon emissions, and consequently our energy costs.	Ongoing	ENGM	ARM DBS	DT CPM	CAB PHAM SWG
		Develop monitoring, recording and reporting procedures.	Complete but continue to review	ENGM	ARM DBS	DT CPM SWG	PHAM SWG
	<b>8.2</b> Reduce energy consumption, CO2 emissions and water usage in line with the Council's energy strategy.	Continue to support the Sustainability Working Group in reducing our energy usage and costs.	Ongoing	ENGM	ARM	DT CPM PHAM	CAB CO&S
		Initial focus on reducing the energy usage of our ten major operational premises and unmetered street lighting.	Ongoing	PAM ENGM	DBS ARM	DT CPM	CO&S
	<b>9.1</b> Compliance certificates in place and property assets remain operational.	Check that the wide range of statutory tests and certificates, making sure a safe environment always exists and statutory obligations are being met, are all in place; including test / certificate requirements covering: <ul style="list-style-type: none"> <li>▪ electrical installations</li> <li>▪ fire alarms and associated equipment</li> <li>▪ fire fighting equipment</li> <li>▪ emergency lighting</li> <li>▪ lighting protection</li> <li>▪ harness and lifting equipment</li> <li>▪ passenger and goods lifts</li> <li>▪ portable appliance test</li> <li>▪ Public Entertainment Licences</li> <li>▪ Legionella</li> <li>▪ Asbestos register</li> </ul>	Ongoing	PAM ESTM	ARM	CPM	PHAM CO&S
			<b>9.</b> Maintain compliance of Council operated property assets to make sure they are fit for purpose.				

**Key / Glossary**

PAMS =	Property Asset Management Strategy	DBS =	Director (NE)
DT =	Directors Team	LSP =	Local Strategic Partnership
PAM =	Property Asset Manager	Partn =	partners / stakeholders
AMU =	Asset Management Unit	PHAM =	Portfolio Holder for Asset Management
ARM =	Asset and Risk Manager	PGO =	SBC Policy & Governance Officer
CAB =	Cabinet	SWG =	Sustainability Working Group
CFSG =	Corporate Finance & Strategy Group	TNRP =	Council commercial property tenants
CIIs =	Councillors (named where possible)		
CO&S =	Scrutiny Committee		
Council =	Council		
CPM =	Corporate Property Premise Managers		
CVA =	Local Council for Voluntary Action		

ENGM = Energy Manager  
ESTM = Estates Manager