

South Derbyshire District Council

**ASSET
MANAGEMENT
PLAN**

2002/03

1.0 ORGANISATIONAL ARRANGEMENTS FOR CORPORATE ASSET MANAGEMENT

- 1.1 This is the Council's Year 2 Asset Management Plan (AMP), prepared using the guidance produced by DETR, and following on from the 'dry run' document produced in November 2000 and the Year 1 document produced in July 2001.
- 1.2 The Plan deals with all Council owned land and property except for most of that which falls within the Housing Revenue Account (HRA)- i.e housing, including sheltered accommodation, and garages. These properties are covered separately in the **Housing Business Plan**.
- 1.3 The Council's Economic Development Manager, who is responsible for Estate Management, is the **Corporate Property Officer** for the purposes of the AMP. He is responsible for co-ordinating the development and implementation of the AMP. During 2001/02 he also lead a **Best Value Review of Asset Management** across the Council (see section 5 for more details). All those involved in property management throughout the authority are aware of his role, as representatives of all relevant departments have been involved in either the AMP steering group or the Best Value Review.
- 1.4 He reports to an **Asset Management and Monitoring Group**, meeting on a monthly basis. The Council previously had two working groups, one dealing with the AMP and the other with the Capital Programme and Strategy. However, following advice received from York Consulting (we are one of the 15 case studies they have used to report of the Asset Management process) it was decided to merge the groups. The membership of the revised group includes the Chief Finance Officer and a number of service division managers including all those who have a property management role. Set out below are the group's terms of reference:

General

1. To develop and monitor the implementation of the Council's Capital Strategy.
2. To develop and monitor the implementation of the Council's Asset Management Plan.
3. To develop and monitor a Corporate Property Strategy for the Council.

Asset Management

4. Consider all asset matters within the Council and provide input to decisions, which have an impact on assets. This includes the identification of the property implications arising from relevant plans, audits and reviews (including those by District Audit and York Consulting (see 1.14), other Best Value Reviews (see 1.13), other Council plans and strategies, and specific initiatives such as the disposal of the depot site (see 5.11)).
5. Ensure that the AMP is approved by senior officers and Members, and that it is informed by and supports other key corporate and service plans and objectives - see examples of this at 1.7 (Capital Strategy), 1.8 (Best Value Performance Plan) and 1.10 (Corporate Plan and Service Plans).
6. To monitor performance of the Council's assets and the AMP action plan. This includes identification and rationalisation of surplus or under-performing property. An example is a parade of town centre shop units which have been placed in the hands of agents for disposal.
7. To report to the Council's Management team and Members on a quarterly basis on the performance of the property estate and the AMP action plan.
8. Oversee the improvement plan arising from the Best Value Review of Asset Management (Annex B). This covers the promotion of shared use (Action 23), and the systematic review and challenge of property use, provision and management (various actions).

Capital Programme Management & Monitoring

9. Co-ordinate the production of the Council's capital programme.
10. Develop and review methodology for prioritising capital projects
11. Monitor the implementation of the capital programme.
- 1.5 In addition, Members are separately consulted on a regular basis on the Asset Management process. The Council has retained a streamlined committee system, rather than moving to a cabinet system. Land and Property responsibilities are currently split between the three policy committees. Responsibility for the Asset Management Plan and Capital Strategy lies with the Finance & Management Committee. However, the Best Value Review concluded that there was a need to improve Members understanding of Asset Management. One of the actions identified to effect this improvement involves a review of the terms of reference of the 3 policy committees, moving final decision making powers on all asset management issues to a single committee.
- 1.6 Until recently the Council had eight strategic objectives from which had been agreed a number of related property objectives. The Council has now prepared a Corporate Plan in which it has revised these eight strategic objectives into eight key aims. Following this, the property objectives have been reviewed. The key aims and property objectives are set out below:

1. **To strengthen and develop the local economy through support for business development and inward investment**

PO 1 Look at opportunities to use Council assets as a contribution to economic and community development schemes developed in partnership with other organisations.

PO 2 Where identifiable economic development objectives are being met, continue to provide premises for small businesses

2. **To safeguard and enhance the natural and built environment**

PO 3 Seek to improve the appearance of sites and premises within the district

PO 4 Enhance the value of recreational and other assets to reduce the need to travel to attractions outside the district and bring services closer to their users.

3. **To address the needs of South Derbyshire residents for good quality homes, of a variety of tenures, located in well planned and safe environments**

4. **To promote the health and welfare of all sections of the community, including access to leisure and cultural activities**

PO 5 Where appropriate, devolve the direct management of assets to the community.

PO 6 Where appropriate create user groups for major assets.

5. **To secure continuous improvements in the quality and efficiency of services provided by the Council**

PO 7 To clarify ongoing asset management arrangements within the Council

PO 8 *To establish the most appropriate method of service provision for the management of each group of assets.*

PO 9 *To achieve Members greater understanding of asset management*

PO 10 *To improve customer satisfaction with the repairs and maintenance service*

PO 11 *To be among the better performing authorities*

6. To manage resources efficiently and effectively

PO 12 *To produce corporate guidelines for the holding, disposal and management of assets*

PO 13 *Improve management capabilities through the centralisation of asset data*

PO 14 *To maximise the efficient use of assets and ensure that they meet current and future needs.*

PO 15 *To identify and efficiently dispose of any surplus assets, any receipts being used for the good of the community in South Derbyshire.*

PO 16 *Look at opportunities to maximise use of Council buildings and provide one-stop services by locating other partners within Council buildings.*

PO 17 *Provide a safe and healthy working environment for staff*

7. To listen to and represent the people of South Derbyshire in county, regional and national arenas

PO 18 *To regularly consult customers on the Council's land and property assets*

8. To support the development of the National Forest and its enjoyment by residents and visitors

PO 19 *To develop and maintain, where appropriate, sustainable facilities which contribute to attracting visitors to the National Forest*

1.7 The **Capital Strategy** provides a framework for the AMP. This sets out the Council's objectives and priorities for capital investment over the next three years. Overall the emphasis is on working in partnership with other bodies to stimulate investment in South Derbyshire. The focus is placed on responsible bidding to emphasise that the Council will only bid for funds where they help to achieve its key aims and objectives. The strategy refers to the Council's recognition of the need to dispose of surplus land to help it achieve some of its capital aspirations. The corporate **Capital Programme Working Group** produced the dry run and first year strategies. As explained in 1.4 above, this group has now been merged with the AMP steering group, therefore the CPO now has a much greater role in its' development.

1.8 The **Best Value Performance Plan (BVPP)** sets out the Council's approach to performance management and efficiency improvements, which are an important element of the AMP. It makes several references to property asset implications, such as the importance of effective and efficient management so that valuable assets can contribute to the achievement of the Council's vision; specific reference to the role of individual Council assets; and a summary of the Best Value Review of Asset Management.

1.9 The Council does not yet have a **Community Plan** but this will soon be prepared and implemented in partnership with organisations in the public, private and voluntary sectors.

- 1.10 The Council has prepared a **Corporate Plan**, which includes the key aims set out in 1.6 above. Flowing from this plan are four Departmental Plans and 12 Divisional Service Plans. **Service Plans**, which are produced on a standard template, indicate how they link to the Council's key aims; explain the corporate and service related challenges affecting the service together with the opportunities which exist; set out the key tasks over the coming year; detail any Best Value and local performance indicators; and set out the resources which the service uses or manages, including assets.
- 1.11 Managers are required to show how their assets are being managed in line with the Asset Management Plan. Once the Corporate Property Strategy (see 1.12 below) has been prepared, the guidance which it contains can be used by managers to determine whether they are optimising the use of each of the assets which they manage.
- 1.12 The **Chief Finance Officer**, who is a key member of the Asset Management & Monitoring Group, has not indicated any specific requirements for the investment portfolio during the coming year. However, as mentioned above, the Council has carried out a Best Value Review of Asset Management over the last 12 months. One of the key issues identified is the need to develop a **Corporate Property Strategy**, whose objectives will include Objectives of such a strategy will include the developing of clear criteria for property in respect of disposal, acquisition and investment and optimising income from non-operational property.
- 1.13 The other **best value reviews** undertaken to date, have not highlighted any asset investment issues. The Best Value Framework document now states that as part of all reviews, there should be a challenge to the current use of assets. The Asset Management Best Value Review has concentrated on strategic issues affecting the whole portfolio. The specific issues relating to individual properties are mostly service related and will therefore be addressed within the reviews of those services, using the guidance developed within the Corporate Property Strategy.
- 1.14 District Audit undertook a study into Asset Management within the authority in 2000/01. Also, the Council was selected to have its Asset Management Plan process evaluated by York Consulting. Their findings have obviously influenced this plan and also our Best Value Review of Asset Management and we are acting on these reports' recommendations.
- 1.15 The Council's first year AMP was given a satisfactory score and the feedback confirmed that all primary criteria were met. The comments within the feedback have been noted, and the suggested improvements made in the development of this document.

2.0 CONSULTATION

- 2.1 The Council is committed (as identified in property objective 18) to consult the community on the best use of assets. It has developed a **Consultation Strategy** to ensure that statutory requirements are met, that limited resources are used economically, efficiently and effectively, and that consultation continues to be meaningful and relevant to local people and other stakeholders. The strategy is in the process of being updated.
- 2.2 Key stakeholders, most of whom have already been consulted, include:
- Divisional Managers, as users of Asset Management services
 - Council staff, particularly as occupiers of Civic Offices and Depot
 - Other users of the Civic Offices
 - Those who use the Council's other directly held assets such as the Town Hall, Sports Pavilions and Parks, Toilets, Car Parks, Bus Shelters
 - Users of facilities managed on behalf of the Council by private sector contractors i.e Market, Leisure Centre and Forestry Centre.
 - Tenants of commercial premises
 - If possible, non-users of Council assets - i.e why don't they use them?

- 2.3 As part of the Best Value Review of Asset Management, a questionnaire was circulated to all Divisional Managers, and other staff directly involved in the management of assets covering some general issues, followed by their views on the various Asset Management services which they use. 14 responses were received.

General Issues

- 2.3.1 57% of responders were clear who manages the different land and property holdings owned by the Council, 43% were not. Particular confusion arises in relation to assets where a couple of different divisions have an input into the management, most notably village halls, pavilions, toilets, car parks etc. The service operated from certain assets may be managed by one division, but those staff do not necessarily have the expertise to deal with more technical issues.
- 2.3.2 Clarity is needed on the remit of the new corporate asset management work being undertaken by the Economic Development Manager, and how this inter-relates with the day to day responsibility for the use of the assets.
- 2.3.3 With regard to home working, whilst several responders said there was very limited opportunities in their divisions, a number said that there were opportunities subject to the appropriate technology being in place. Most divisions need to be available at short notice to deal with the public, members or other officers. Where staff are working on reports or particular projects then there is more scope. Environmental Health suggest that, subject to receiving the appropriate support, many of their staff could operate from home.
- 2.3.4 Hot desking already occurs to some extent in IT & Customer Services, Community & Leisure Development and Revenue. Most divisions have said that there is little scope for this.

Property Management Services

- 2.3.5 A number of responders did not complete this section as they do not use these services. Responders were asked their opinion on overall service provided; quality of instructions provided by them to enable you to service their needs; response time to requests and helpfulness of staff, with 1 being poor and 5 being excellent. Responders were asked to explain where they were dissatisfied about an issue, and to suggest how the service received could be improved.
- 2.3.6 Estate Management (Covering Commercial/Industrial portfolio, general land & property enquiries, valuation advice, disposals, co-ordination of Asset Management Planning)

7 of the responders completed this section. The majority were pleased with all aspects of the service, and two responders said that helpfulness of staff was excellent. None of the issues were said to be poor, but there was a single score of 2 against three of the issues.

Comments received suggested that Estates should have a wider appreciation of what other units do; that a detailed profile of the service would be helpful, and that additional valuation training was required, together with more co-ordination with in-house Building Surveyors/QS on valuation matters.

- 2.3.7 Building Maintenance (Covering maintenance of most Council property, management of the Civic Offices and Depot)

For this service the question on quality of instructions provided was replaced with two other questions, one on quality of repairs/maintenance and one on quality of technical support/advice.

9 of the responders answered most of the questions. A number of responders were unhappy with various issues and there were few scores of 4 or 5 recorded. Three of the nine felt that overall service was poor and another gave it a score of 2. Most responders said that quality of repairs and maintenance was satisfactory (3) but one said it was poor and another gave it a score of 2. Only

seven responders answered the question about quality of technical support/advice, and three of these said it was poor. Three also said that response times were poor, whilst one gave this a score of 2. Finally two responders said that helpfulness of staff was poor and one gave it a score of 2, although four did give a score of 4 for this issue.

Those who were dissatisfied commented that response times and quality of service were poor compared to other internal services; that it took a very long time to get a response regarding a quote for some work; and that the response time for emergency repairs was better than that for less urgent ones. Also that the housing stock was given a higher priority than other buildings; that funding issues can cause problems; and that there is a lack of feedback provided on actions to be taken, timescales and the progress of identified work. Also that the customer receives a poor service and that others have to deal with the associated complaints.

Suggested improvements include clear objective setting for staff with performance monitoring and accountability; adopting a client/contractor culture i.e realising that they are providing a service to other departments and members of the public, sometimes advising those with little or no knowledge of the subject.

2.3.8 Facilities & Development (Covering Parks & Play areas, Car Parks, Leisure Centres, Market, Town Hall, Public Open Space)

Only five people provided responses to this section. There was a spread of scores, with one person saying they were poor for the quality of instructions provided, two giving them a score of 2 for response times, but all saying the staff were helpful (incl one score of excellent).

It was suggested that it may be better to have a centralised property department to deal with the management of all assets.

2.3.9 Community & Leisure Development (Covering Rosliston Forestry Centre)

Only four people provided responses for this section. The majority were happy with all aspects of the service (including three scores of excellent). There were however two scores of 2 related to the quality of instructions provided.

No-one provided any comments.

2.3.10 Direct Services (Covering Public Toilets, Bus Station, Bus Shelters)

Again only four people provided responses for this section. There single poor scores for overall service provided and response times, and three scores of 2. Most of the other scores were 4.

There was a comment that some staff are not especially helpful.

Supporting Services

The same questions were asked except the one related to quality of instructions provided.

2.3.11 Legal

7 people provided responses. Everyone was very happy with the service except for one score of 2 related to response times. Notably there were two scores of excellent against each of the questions.

No comments were made

2.3.12 Finance (Income/insurance)

Again, 7 people provided responses. The majority were happy although there were single scores of 2 against response times and helpfulness of staff. There were three scores of excellent, one for each question.

There was a comment that the income section's service could be improved by a greater understanding and appreciation of the requirements of service units.

2.3.13 Any other comments

- Raising standards to a level of good service across the Council should be the priority.
- Many services may not initially need to improve, they just need to communicate their function and service to users and potential users.
- More supporting info to expand on the roles of the various sections would be helpful, and a better understanding of who is responsible for what
- The Asset Management function of the Authority is advancing and improving considerably better than at any time in the past.

2.4 All commercial tenants have been questioned on their views about the condition of their premises, speed and quality of repairs, signage, access & parking, the overall service provided by the Council as Landlord, and whether the Council should continue to manage the premises or whether it might be more appropriate for the day to day management to be handled by agents or another organisation.

2.5 Responses were received from 15 of the 48 tenants questioned (31%). The main findings are:

- The majority of tenants were very or fairly satisfied with the condition of their premises.
- An equal number were either satisfied or dissatisfied with speed of repair work whilst no-one was dissatisfied with the quality of work.
- Signage was the issue which most tenants were dissatisfied with, whilst access and parking were generally considered satisfactory.
- The majority of tenants were satisfied with the overall service provided by the Council as Landlord
- All respondents thought the Council should continue to manage the premises rather than agents or another organisation

2.6 In 1999, bi-annual meetings were established with all of the Council's industrial and commercial tenants to provide the opportunity for tenants to discuss all manner of property related issues. In general, interest in these meetings has been limited and we therefore asked, as part of the consultation exercise identified in 2.4 for tenant's views as to their continuation. Although a number advised that did not wish to attend these meetings, the majority said they should continue and, on balance, on a bi-annual basis.

2.7 All tenants also said that in addition to the meetings they appreciated being able to discuss any concerns they had as and when with the Council's Estates Officer.

2.8 The tenants of the George Holmes Industrial Estate have been consulted separately about security measures for the estate following several incidents. The result of this is that the Council put together a scheme to provide security fencing and an entrance barrier, jointly funded by the Council, tenants and Single Regeneration Budget grant.

2.9 The tenants of the Boardman Estate have been consulted separately about access, circulation and parking issues. The result was that following the preparation of various suggested schemes, which would have required a financial input by the tenants, they decided to leave things as they were.

2.10 Users of the Town Hall were asked a number of questions, with the issue of maintenance standards being pertinent to the AMP. Of the 49% of respondents, all felt that maintenance standards were good or excellent.

- 2.11 Eleven football clubs who use Sports Pavilions (changing rooms) and football pitches were also asked their views on a number of issues. Of the 64% who responded, the majority felt that the maintenance standard of certain individual pitches was poor but that of changing rooms was good. Comments made included that certain pitches were poorly drained, boggy and rutted and suffered from vandalism whilst some changing rooms lacked heating and showers.
- 2.12 Bus companies were sent a questionnaire to seek their views on bus shelters and the bus station. With regard to bus shelters, all respondents felt that there were insufficient number, were not well placed and were not particularly clean. The majority did feel, however, that they were in fairly good condition. With regard to the bus station, all respondents felt that there were sufficient bays, adequately placed, in good condition and clean.
- 2.13 As part of their Asset Management report in 2000, District Audit sent a questionnaire to a number of staff covering satisfaction with property services, access, IT, condition, toilets, parking and space issues. Most respondents commented on the office space which they occupy whilst others were able to comment on their experiences of managing other properties.
- 2.14 The main findings were as follows:
- The majority of respondents, whilst satisfied with the quality of repair works, were dissatisfied with the speed with which the repairs were carried out. Several respondents also commented on various other problems with the Building Maintenance service.
 - Most respondents were satisfied with the quality of technical support and advice received and with the cleanliness of the public buildings.

 - No-one had been previously surveyed on their satisfaction with these services or been involved in setting standards for property service work or monitoring contractor performance.
 - Most people were happy with the level of office space and toilet facilities, but experienced a shortage of storage space. The majority felt that buildings were in a poor physical condition or decorative state, but were adequate to cope with modern IT equipment. A few respondents felt that disabled access needed improving and that the office layout was inflexible.
 - Most respondents had no forum or procedures through which they could raise these problems.
 - 3 respondents had space within their building surplus to their needs whilst almost all had never been asked to record and report on how their space was used and/or occupancy levels.
 - Most respondents had not consulted with any external users or clients of buildings on their needs, or compared the costs of accommodation with outside organisations.
 - Respondents indicated a variety of things which they would like to do to improve their buildings, most of which are related to the above points.
- 2.15 In January 2000 a survey of various issues relating to the Town Centre was conducted by Southern Derbyshire Chamber in liaison with the Council. One of the main issues raised was the condition and cleanliness of the Bus Station toilets. In response to this, Single Regeneration Budget funding was earmarked for a £10,000 facelift of the toilets. The work has been completed and increased levels of cleaning agreed.
- 2.16 The Greenbank Leisure Centre in Swadlincote, which is managed under contract by SLM, have undertaken joint consultation (with the Council) with users. Two of the questions asked related to building cleanliness and building decoration. 85% of those who responded thought that both of the above were good or satisfactory.
- 2.17 A citizens panel questionnaire has recently been sent out seeking views on the Council's parks. The majority of District panellists were satisfied with parks and open spaces within the area, only 22% were dissatisfied. Of those dissatisfied, vandalism and cleanliness were the areas of most concern.
- 2.18 Other key stakeholders whom the Council intends to consult (as part of Best Value Reviews of Regeneration Services and Technical Services in 2003/04) include the 'Friends of Groups' which

currently exist for various parks, Allotment holders, Village Hall users and Market traders. Active 'Friends of Groups' have been formally established in two of the three Swadlincote urban parks. In addition to playing an active practical part in improvements at these parks, the Groups are pursuing, with Council officers, sources of external funding to implement jointly agreed development plans for the sites. Consultation with the staff, traders and users of the Market and Leisure Centre will need to be undertaken in liaison with the companies who manage those facilities by way of contract with the Council.

2.19 The Council is developing a sound approach to including building users in property decisions. Relevant managers are consulted when requests are made by the public to lease or purchase pieces of land. In addition managers have been consulted about repairs and maintenance and staff are consulted when offices are altered internally.

2.20 The main concerns which the consultation exercises have identified are as follows, together with details of how they have or will be addressed.

- Signage on industrial estates - **the Council are discussing with a local business the provision of a new sign at GHBC**
- Security problems at GHBC - **barrier and fencing being erected**
- Poor condition of sports pitches - **drainage improved over recent years. Recent survey by the Football Association into condition of pitches could release funds for improvements**
- Insufficient number of bus shelters, not well placed and not particularly clean - **A new cleaning company has been employed who are cleaning shelters on a monthly rather than quarterly basis. From April 2002, the Council will be working with Adshell who will be replacing a number of shelters, as will Derbyshire County Council.**
- Shortage of storage space at Civic Offices and inflexible office layout. Other staff have space surplus to their needs - **these concerns will be taken into account when reviewing space standards and the re-use of surplus space.**
- Civic Offices in a poor physical condition or decorative state - **to date the Council has not viewed this as a priority. Will be addressed further when reviewing the work environment.**
- Disabled access needs improving - **implementation plan will look at this**
- Civic Office/Depot users feel they have no forum or procedures through which they can raise problems. Almost all staff have never been asked to record and report on how their space is used and/or occupancy levels - **to be looked at in the implementation plan**
- The Managers of most buildings have not consulted with any external users or clients of buildings on their needs, or compared the costs of accommodation with outside organisations - **these comments were made prior to the many recent consultation exercises that have taken place. Costs of accommodation are being addressed through the government's PI's following which comparison will become much easier.**
- Poor condition and cleanliness of Bus Station toilets - **£10,000 improvements undertaken and regularity of cleaning increased**
- Clarity of management responsibilities - **addressed through implementation plan**
- More co-ordination between Estate Management staff and in-house Building Surveyors/QS on valuation matters - **being progressed. The two departments are currently working together on Pavilion valuations. Working arrangements between the two departments have been strained but new arrangements for dealing with tenant enquiries are now being effected which should improve matters. Regular dialogue will continue to ensure that problems are dealt with quickly and effectively.**
- Repairs and Maintenance service concerns - **to be addressed in improvement plan**
- Income section's service could be improved by a greater understanding and appreciation of the requirements of service units - **to be addressed as part of the Financial Services Best Value Review which has recently commenced**
- Raising standards to a level of good service across the Council should be the priority - **hopefully the increasing awareness of asset management amongst officers and members will help achieve this**
- Services need to communicate their function and service to users and potential users. More supporting info on the roles of the various sections would be helpful - **following the review of management**

responsibilities, a guide will be produced showing what each section does and who is responsible for what.

3.0 DATA MANAGEMENT

- 3.1 All Council owned non HRA property is recorded in an asset register held on a Microsoft ACCESS **database**. The data was entered in 2000 and includes size and value, condition, how the asset was acquired, whether it is still required, whether users have been consulted about it and whether it has been subject to any form of review. The database is of a form that it can be used in conjunction with other relevant databases within the authority. The individual asset records on the database can be updated at any time as required. The database is a live system and can be updated by nominated officers in each service area. It was validated in 2002 to ensure that the information was correct.
- 3.2 The majority of the Council's deed packets have been reviewed and the information transferred onto computerised records (GDC Plan Terrier), which links to MapInfo. Intermediate data is available for most properties and is held locally, rather than centrally.
- 3.3 Current management systems operate effectively and all data is available from various sources (this was confirmed as part of the Best Value Review). This includes intermediate data, such as condition, rents and user details. However, as part of the Best Value Review of Asset Management, consideration was given to future data requirements, particularly in the progression towards greater e-government. The Review Team agreed with York Consulting that there was a need to try and further centralise asset data (see action 16 in Improvement Plan (annex B). An initial meeting with IT agreed that a number of data management systems would be explored. The CPO and an IT advisor have visited other authorities to view a number of IT asset management packages, and are now considering the best way forward, bearing in mind the need for any system to link with financial information systems and those for The constraints to achieving this centralisation are the cost of purchasing the software and the staff resources required both to initially transfer the data and then to keep it up to date. As a small authority with a limited property portfolio, the Council will need to decide to what degree it is appropriate to pursue this data centralisation given these constraints.
- 3.4 As part of putting together the Baseline Assessment for the Best Value Review, an audit of training needs was undertaken - this concluded that staff are adequately skilled to effectively utilise current systems. The Council has introduced annual Performance & Development Reviews which highlight staff training requirements. Further training will be required to make effective use of any new systems which are introduced.
- 3.5 As part of the authority's move towards BS7666 we anticipate Unique Property Reference Number (UPRN's) being allocated as part of the National Land and Property Gazetteer (NLPG). – initial copies of the main Council property lists have now been issued to Intelligent Addressing for data cleansing and on return, work will commence on removing any of the addressing anomalies identified. UPRN's will be allocated from the central government NLPG hub as administered by IA. Current estimates of timescales for this work are given in the following section.
- 3.6 The Council's **IT Strategy** provides for a centralised **Land and Property Database** to be developed as part of our contribution to the NLPG. At present it is envisaged that following the "first cut" of our BS7666 LPG being returned from Intelligent Addressing Ltd, we will embark on a series of "Data Matching" exercises. On compiling these exercises we will combine the data captured elsewhere onto the MapInfo GIS for integration graphically.
- 3.7 The authority has devoted considerable resources towards the successful implementation and ongoing administration of NLPG. It is anticipated that the process of keeping data to BS7666 will be an on-going process handled by a dedicated section for which recruitment is in progress. A new server has been purchased along with the necessary software to maintain any BS7666 LPG's and training to perform continuous data matching exercises is expected to commence end July 2002 assuming a successful conclusion of the data matching exercise with IA. Following this, work to link the local

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authority's central hub to divisional systems and on to the central government hub will commence in August 2002.

3.8 These implementation plans have been submitted to the IDeA for assessment.

3.9 **Statement of Assets** (non-housing)

Operational	Value (2000) - where known ** £
2 Leisure Centres	3,230,000
Civic Offices	1,800,000
19 Car Parks	819,500
George Holmes Business Centre management suite	660,000 (including workshops)
Forestry Centre	328,900 (including craft units)
10 Public toilets	254,150
4 Village Halls	94,000
Depot	77,000
Town Hall	47,000
Squash Courts (Etwall)	
15 Sports Pavilions	666,000 (March 2002)
19 Recreation Grounds	
8 Play areas	
7 Amenity Areas	
4 Parks	
Ecology area	
4 areas of Common land	
138 areas of Public Open Space *	
8 Allotments	
6 Cemeteries	
148 Bus Shelters	
 Non-Operational	
14 hectares of residential development land (16 sites)	3,088,000
Large Industrial complex	1,550,000
16 shops & restaurants	1,070,000
27 units at George Holmes Industrial Estate	660,000 (incl management suite)
6 Craft units	328,900 (incl Forestry Centre)
4 Miscellaneous Properties	247,000
Market Hall	215,000
14 units at Boardman Industrial Estate (leasehold interest)	
Large site on long lease	
Small areas of garden/grazing etc land (number to be determined)	

* Each public open space record relates to a particular street and may contain several individual pieces of open space.

** Values are those used for Capital Accounting purposes and not necessarily Open Market Value.

3.7 Certain of the assets classified as non-operational, but which are held for economic development or community benefit reasons, such as shops on housing estates and the market, could be classified as operational.

3.8 The majority of operational and investment assets were re-valued at £14.1m in March 2001. To this can be added the Sports Pavilions valued at £660,000 in March 2002. The community assets are valued at £2.75m based on historical costs of purchase and capital works undertaken.

4.0 PERFORMANCE INFORMATION, MANAGEMENT & MONITORING

4.1 Regular reports (we have endeavoured to provide these quarterly) on the performance of the property estate are submitted to Members and Chief Officers, in addition to service plans which set out performance outcomes in relation to pPI's. Reports are also provided to Members, as part of a regular Finance briefing, on the progress and performance of the capital programme.

4.2 The spreadsheet attached as annex A gives details of the performance indicators which are monitored. These include the 5 DETR pPI's, some Best Value indicators and other local indicators.

4.3 The % reduction in rent arrears used to be measured when this was a major problem for the authority. Over the last 3 years these have been drastically reduced and all lettings are much more closely monitored to stop arrears accruing, therefore the figure is no longer monitored.

4.4 Space allocation (persons/sq. m) used to be regularly monitored. In recent years this has not happened but monitoring will shortly re-commence. The Best Value Review has highlighted as a key issue the need to review and re-use surplus space within the Civic Offices - see actions 21 & 22 in the Improvement Plan.

4.5 The Council has made a number of efforts to develop other local indicators which can be benchmarked with other authorities. As part of the development of the November 2000 AMP, a draft table of PI's was put together, using as a reference the DETR's initial suite of **national property performance indicators**, and the updated 'high level' indicators (pPI's) set out in subsequent guidance, together with our own suggested indicators to measure our success in achieving our Property Objectives - see Annex C.

4.6 This draft table of indicators was circulated to other Derbyshire authorities, our neighbouring authorities and to the Daventry Benchmarking Group of Councils, to ascertain whether they were likely to also measure the same or similar indicators.

4.7 The response was disappointing with only a handful of authorities responding. Most of those which did respond said they will be monitoring the DETR 'high level' indicators (pPI's) and perhaps one or

two of the others which the Council suggested. However, it would appear that most of our suggested indicators, which related to our Property Objectives, were too specific to be able to be benchmarked.

4.8 The AMP steering group decided therefore that for 2002 the Council would only monitor the DETR's 5 Property performance indicators (pPI's), together with the Best Value Indicators already being monitored, plus a couple of local indicators, and review the position following submission of the July 2002 AMP.

4.9 As all local authorities have to monitor the 5 pPI's and report on them in their July 2002 AMP's, the Council felt that rather than endeavour to try and benchmark its performance now (as can be seen above the results of recent attempts to benchmark have been disappointing) the Council would wait until after July 2002 following which it should be much easier to benchmark on a like for like basis and establish the upper quartile for each of the indicators. The Council has built into its Best Value Improvement Plan the task of undertaking such benchmarking and analysis later in 2002, following which it will be able to assess what is required to achieve the higher standards required.

4.10 In addition, now that a revised set of property objectives have been prepared, it would seem appropriate to revisit this issue, develop another range of local indicators, and once again see whether there are opportunities to benchmark these with other authorities. Once undertaken, the results of

such benchmarking will be used to further improve our performance. This has been programmed into the Action Plan in section 6.2.

- 4.11 As set out in section 2 of this plan, the Council has consulted widely with asset users, and has begun to implement a range of issues flowing from this consultation (see 2.20). The next stage is to review whether additional performance measures are required to reflect these findings (see Action Plan 6.2)
- 4.12 For the Best Value indicators identified in the attached spreadsheet, the Council is above average in relation to the provision of accessible buildings and the number of playgrounds and play areas provided per 100 children under 12.
- 4.13 The Derbyshire local authorities Estates Officers now meet regularly and have agreed to benchmark with each other. A group of Economic Development Managers from the Midlands and wider afield are meeting to discuss benchmarking involving certain property based PI's. Derbyshire Leisure Officers also meet regularly to discuss, amongst other things, the benchmarking of facility based leisure activities.
- 4.14 Most of the authorities and businesses with whom the Council compared itself as part of the Best Value Review said that they would be happy to benchmark with us.
- 4.15 Other Benchmarking opportunities have been explored, such as the work co-ordinated by Sheffield Hallam University and the service offered by the IPF network. However, the cost of joining these networks is prohibitive for this Council.

5.0 PROGRAMME DEVELOPMENT

- 5.1 Over the last few years, there have been a number of improvements in the management of assets. Some of these are set out below:
 - The Council has begun to consider which of its assets are no longer required and has effected a number of disposals (including several areas of housing land);
 - The Council has started to share its premises with like minded organisations e.g neighbourhood watch, the Crime and Disorder Partnership and Citizens Advice Bureau. The management building at the George Holmes Business Centre is used by Business Link as a spoke office.
 - The Council has developed a pragmatic approach to managing facilities, with the private sector being contracted to manage a number of assets resulting in a number of benefits to the authority.
 - The Community has been involved in the management of assets e.g 'Friends of groups have been established for several of the Parks.
 - Management of certain assets has been devolved to as local a level as possible e.g Parish Council management of Playing Fields and Public Toilets.
 - Commercial asset management procedures have been fundamentally reviewed i.e overhaul of lettings policy & procedures; ensuring all tenants have up to date leases; ensuring all rents are reviewed to market levels in a timely manner; major reduction in the level of rent arrears etc
 - Flexible lease terms have been introduced on most of the Council's industrial properties and certain commercial properties.
 - 91% of the Council's commercial portfolio of 69 industrial units, shops, offices and miscellaneous properties are let or under offer, a major increase on previous years. Income from commercial lettings for 2001/02 was consequently much higher than in previous years.
 - The main public toilets in Swadlincote Town Centre have been refurbished with the assistance of SRB monies.
 - The Council has recognised its Health & Safety responsibilities in relation to its' units e.g additional funding has been secured for 2002/03 to pay for the cost of undertaking electrical and gas tests on all units prior to re-letting.
- 5.2 As indicated earlier in the plan, over the last 12 months or so the Council has undertaken a **Best Value Review of Asset Management**, led by the Economic Development Manager (Corporate

Property Officer). The Council recognised the importance of this area and placed it in Year 2 of its five year programme.

- 5.3 The review cut across a number of service areas. Asset Management includes work undertaken within Economic Development, Facilities and Development, Community and Leisure Development, Direct Services, Building Maintenance, Legal and Member Services and Exchequer Services. Most of these divisions were represented on the review team, together with officers from a neighbouring District Council and the County Council, and Labour & Conservative Members.
- 5.4 It was agreed at an early stage that the review would focus on strategic asset management, rather than the detail associated with each particular asset or group of assets. The detail will be considered in individual service best value reviews when the CPO will assist, using the guidance developed within the Corporate Property Strategy, in determining the suitability of the various categories of the portfolio for their current and future use. The customers of Asset Management services are primarily officers and Members of the Council, together with those users who have a legal interest in property e.g commercial tenants. In general, the public use the services run from assets and are less interested in the asset itself.
- 5.5 A large amount of work on asset management had already been undertaken during the last few years, both nationally and within this Authority (see 5.1). Some of the findings and recommendations of the various reports and studies had already been implemented prior to commencing this review. The team decided that the scope of the review would be based on the remaining recommendations of the work undertaken by District Audit, the Audit Commission's Hot Property report, the previous Asset Management Plan's action plan and the work carried out by York Consulting, together with the findings of consultation work undertaken to date.
- 5.6 Each of the issues within the scope of the review was given full consideration, using the four 'C's' of Challenge, Compare, Consult and Compete.
- 5.7 Eight key issues were identified as needing action if the services are to improve. These have been further developed into required outcomes as follows
1. To have produced corporate guidelines for the holding, disposal and management of assets
 2. To clarify ongoing management arrangements
 3. To establish the most appropriate method of service provision
 4. To achieve Members greater understanding of Asset Management
 5. To improve customer satisfaction with the Repairs & Maintenance Service
 6. Improve management capabilities through centralising asset data
 7. Achieve the efficient use and management of the Civic Offices
 8. To be among the better performing authorities for Asset Management
- 5.8 The report concludes with an Improvement Plan to deliver the required outcomes listed above. A copy is attached as annex B. This forms the main programme of action for the coming year, although additional plans for disposals, property sharing and maintenance are set out below.
- 5.9 A survey of Council owned non-housing properties was undertaken in 2001 to broadly categorise them into the four **condition** categories - see pPI 1 in annex A. The Council's properties are generally in a good state of repair and the backlog of maintenance works is relatively low. Most of the maintenance works identified were the subject of bids in for the 2002/03 capital programme. Those bids were seen by Chief Officers and Members and were in effect a written report on the maintenance backlog, with

the bid being the recommended appropriate action. Regretfully, none were successful. However, in a further bidding round held in June 2002, £20,000 has been allocated for internal refurbishment of the Civic Offices. The case will continue to be made through bids for next years Capital Programme. Some of the works of a minor nature will be incorporated in planned maintenance programmes.

5.10 To support the responsive maintenance the Council operates a **Planned Maintenance Programme** for the majority of its public buildings. The scale of the programme varies for the different types of properties and lease agreements and deals mainly with the following:

- water hygiene management
- heating maintenance
- external decoration
- fire & intruder alarm
- ad-hoc maintenance of other electrical & mechanical appliances

Due to a limited base budget the majority of work covered by the annual maintenance programme concentrates mainly on the services, plant and equipment as opposed to the external fabric and structure. Following the completion of the recent condition survey, the majority of defects identified relate to the Councils Sports Pavilions and Village Halls and are of a minor nature due to the poor condition of the external paintwork and lack of a cyclic maintenance programme.

The Best Value Review has identified the need for Planned Maintenance programmes for all assets (action 15 of the Improvement Plan) and these will be put in place over the coming months.

A five year planned cyclic external repair and painting programme is due to commence in August 2002 to maintain the properties to at least a satisfactory condition with all costs being contained within the current base budget.

5.11 As indicated in 5.1, the Council has begun to consider which of its assets are no longer required and has effected a number of disposals. Formal procedures for identifying under-used or surplus property are to be developed as part of the Corporate Property Strategy (see the Improvement Plan - actions 1-3). Disposal Plans for the coming year include:

- several public toilets which have been declared surplus and for which disposal options are being considered;
- a parade of Town Centre shop units, probably to the existing tenants;
- the Council's depot site, subject to agreeing alternative delivery arrangements for depot based services;
- the management building at the George Holmes Business Centre - transfer to Southern Derbyshire Chamber for continued business support use

5.12 There is certainly surplus space within the Civic Offices. The Improvement Plan identifies actions (21-23) to address this and determine further opportunities for property sharing. Discussions have already taken place with the Probation Service and County Council in this regard. A Tourism partnership involving all the National Forest authorities is being developed, which will see neighbouring District Councils use their Tourist Information Centres (TIC's) to promote South Derbyshire (which has no TIC).

5.13 The steering group has endeavoured to consider the issues which may influence the Council's **future asset requirements**. Whilst no such gaps are apparent at present, it is recognised that changes in technology will provide opportunities to review the accommodation which the Council requires e.g. through home working, locating services closer to people who use them etc. Best Value, the growth of Partnership working and the advent of e-commerce may also have a potential impact. If a particular service were to no longer be undertaken by the Council e.g. the provision of a housing service, this would potentially free up space. These issues are kept under review.

- 5.14 The new Service Planning process requires managers to consider medium and long-term opportunities and challenges that will affect the assets required in the delivery of the service. As mentioned in 5.4, as they undertake Best Value Review's of their individual services, managers will determine the suitability of the assets they control and whether there are gaps between their requirements and the current provision and performance of assets.
- 5.15 Funds have been secured for 2002/03 to undertake additional improvement work at the Boardman Industrial Estate and George Holmes Business Centre.
- 5.16 The Council uses a **prioritisation system** (set out in detail in Annex C to the Capital Strategy) which focuses on how individual capital schemes contribute to the Council's corporate aims and objectives, plus also what effect the investment will have on achieving specific service objectives. It also considers national priorities. The other factors taken into account are sustainability and the level of external funding which a scheme will generate. Sustainability recognises the ongoing running costs associated with new capital projects. It is no use providing a new facility where there are insufficient revenue resources to run it. This prioritisation scheme has been used to assess all projects within the current capital programme.
- 5.17 The Capital Strategy 2001/02 recognised the need to develop performance measures that focus on the outputs produced by capital schemes rather than the core process of monitoring the implementation of the schemes and these have now been put in place.
- 5.18 The production of the Capital Strategy has enabled the Council to look again at how it plans capital investment. In recent years with limited capital resources, the Council took a short-term view focused on making the best use of the resources that become available on an annual basis. This meant that the capital programme was simply an annual plan
- 5.19 As part of the 2001/02 budget process, the Council moved to a **5-year programme**. The intention is that this longer-term programme will help to focus council resources and bidding effort on schemes that are prioritised within the programme.
- 5.20 The programme is in its infancy and it will take time for longer term schemes to emerge. All of the current schemes seeking capital funding are summarised in the context sheet, together with details of how where capital funding is drawn from (this includes a forecast of capital receipts). These are analysed across the main priority areas identified within the Capital Strategy.
- 5.21 This programme will be developed over time and will clearly need to take into account new pressures on capital finance that are not fully identified within the existing programme. These include both e-government preparation as well as providing extra resources to deal with repair backlogs as identified within this document.
- 5.22 The Council places a high priority on regenerating and encouraging investment in South Derbyshire, especially in areas that have previously experienced high levels of unemployment. The Council places particular emphasis on improving the quality of life for existing residents as well as attracting tourism into the area. It is therefore seeking to use capital resources to work with private and public partners to generate investment within the District. This is set out in more detail within the Capital Strategy.

6.0 ACTION PLAN

6.1 Set out below is the **Action Plan** from the July 2001 document showing progress made.

Action	Responsible officer	Progress
1. Produce quarterly reports for Members and Chief Officers	CPO	Reports scheduled
2. Commence monitoring of high level and local PI's and active benchmarking	CPO/Service Managers/BM	S: August 2001
3. Undertake wider consultation with all asset users	CPO/Service Managers	S: September 2001
4. Continue process of validating statement of assets and Council's interest therein	EO	F: February 2002
5. Cost repairs required to bring Category C properties to Category A standard and include within Capital Programme	BM	Repairs costed and being undertaken from existing budgets
6. Continue to review lettings for which no detailed records exist	EO	Ongoing
7. Review current management arrangements for property to ensure that duplication and lack of clarity is avoided	CPO	Considered as part of Best Value Review and Improvement Plan F: Dec 02
8. Examine options for providing incentives to occupiers to reduce running costs	CPO	Considered as part of Best Value Review and Improvement Plan F: TBC
9. Review space standards and utilisation	CPO	Considered as part of Best Value Review and Improvement Plan F:TBC
10. Examine options for introducing alternative forms of working	CPO	Considered as part of Best Value Review and Improvement Plan F:TBC
11. Progress assessment of disposal opportunities	CPO/EO	Considered as part of Best Value Review and Improvement Plan F:TBC
12. Progress proposals for property sharing (through BV Review)	CPO	Considered as part of Best Value Review and Improvement Plan

ASSET MANAGEMENT PLAN 2002/3

		F:TBC
13. Develop Corporate Property Strategy including formal procedures for identifying surplus or under-used property.	CPO	Considered as part of Best Value Review and Improvement Plan F:TBC

Key: CPO Corporate Property Officer S = Start F = Finish
 EO Estates Officer
 BM Building Maintenance Manager
 IT IT Manager

6.2 Set out below is the Action Plan for the next 12 months. However, note that most actions are set out in the Best Value Improvement Plan (annex B), and are not repeated in this Action Plan.

Action	Responsible Officer	Date
1. Oversee and monitor the delivery of the Best Value Improvement Plan	Asset Management & Monitoring Group	S: July 2002 F: December 2004
2. Confirm preferred Data Management System and bid for resources required	CPO/IT	S: September 2002 F: November 2002
3. Re-bid for resources to deal with maintenance backlog	BM	October 2002
4. Develop local indicators based on revised property objectives and consultation findings and attempt to benchmark	Asset Management & Monitoring Group	S: September 2002 F: December 2002
5. Keep under review future asset requirements and any gaps in provision which they may generate (particularly following future BV reviews)	Asset Management & Monitoring Group	Ongoing
6. Produce quarterly reports for Members and Chief Officers	CPO	October / January / April / July

6.3 The above Action Plan will be monitored by the CPO and the Asset Management and Monitoring Group to ensure that the issues are dealt with and the results incorporated into the next AMP in July 2003. Regular reports will also be made to members on the progress of the issues identified.

ASSET MANAGEMENT INDICATORS					ANNEX A
DETR property performance indicators					
pPI 1	% gross internal floor-space in condition categories A-D:				
	Non-Operational (general)	Area (sq m)	% of total	Operational (other land and buildings)	% of total
A	1999		6.5	752	2.5
B	12031		39	12655	41
C	716		2	2709	9
D	0		0	0	0
	Backlog of maintenance by cost expressed as a % in priority levels 1-4 and by value:				
	Non-Operational (general)	Cost (£)	% of total	Operational (other land and buildings)	% of total
1	3560		2.5	3490	2.5
2	2820		2	12115	9
3	8065		6	14570	11
4	700		0.5	90400	66.5
pPI 2	Overall average internal rate of return (IRR) for each of the following portfolios				
	(a) industrial			6.68%	
	(b) retail			6.02%	
	(c) agricultural			n/a	
	(d) commercial			5.85%	

pPI 3	Total annual management costs per sq.m (GIA) for operational property				£9.40	
	Total annual management costs per sq.m (GIA) for non-operational property				£2.62	
pPI 4	Repair & maintenance costs per sq.m GIA		Civic Offices	£5.22	Depot	£2.69
	Energy costs per sq.m GIA			£4.80		£2.98
	Water costs per sq.m GIA			£0.65		£1.87
	CO2 emissions in tonnes per sq m			0.073		0.049
pPI 5	% of projects where outturn falls within +/- 5% of the estimated outturn, expressed as a % of the total number of projects completed in the financial year			Figures awaited		
	% of projects falling within +5% of the estimated timescale, expressed as a % of the total number of projects completed in that financial year			Figures awaited		
Best Value Performance Indicators						
	Title (BVPI or AC no 2001/02)	S Derbys actual 01/02	S Derbys target 01/02	Top 25% English Districts 00/01	Average Audit Group 00/01	Average Derbyshire Districts 00/01
	No of authorities buildings open to the public (A1a)	10	10	n/a	12	16
	No of such buildings in which all public areas are suitable for and accessible to disabled persons (A1b)	6	6	n/a	3	4

No of public conveniences provided by the authority normally throughout the year (£3)				5		n/a	7	18
No of playgrounds and play areas provided by the Council, per 1000 children under 12 (I2a)			3.39			3.2	3.1	3.2
Local Indicators								
		Target	Actual	Estimate				
		2002/03	2001/02	2001/02				
Number of units void as % of total		5%	10%	25%				
% of under or over performance related to target income level		0%	5% more income	0%				

ASSET MANAGEMENT - DRAFT IMPROVEMENT PLAN
(to be finalised and agreed)

Notes:

- The improvement plan runs for 2.5 years from July 2002 (although certain issues being looked at prior to this)
- We are aiming to tackle the highest priority issues within the next 18 months.
- S = start date F = finish date
- CPO - Corporate Property Officer (Economic Development Manager)
- EO - Estates Officer
- BM - Building Maintenance Manager
- FD - Facilities & Development Manager
- DS - Direct Services Manager
- LMS - Legal & Members Services Manager
- CE - Chief Executive
- CFO - Chief Finance Officer
- IT - IT Manager
- PD - Personnel & Development Manager
- TS - Technical Services Manager

There are potential staffing resource issues in delivering most of the actions set out below, and individual divisions will prioritise the time which they can spend together with their other duties. A specific reference is made within the Resources box where it is anticipated that there may be particular difficulties.

KEY ISSUE 1. ABSENCE OF A CORPORATE PROPERTY STRATEGY

Required outcome: To have produced corporate guidelines for the holding, disposal and management of assets

Action	Target Date	Performance Measures	Resources	Staff responsible	Lead Officer
1. Develop a corporate property strategy.	S = July 02 F = Nov 02	Strategy completed	Potential staffing resource issues	CPO & AMP steering group	CPO

2. Review and develop management procedures for each group of assets and apply the revised property objectives to each asset to determine suitability for current and future use.	S = Dec 02 F = May 03	Procedures in place	Potential staffing resource issues	All property managers	CPO
3. In line with the holding and disposal guidelines developed in the corporate property strategy, continue with the process of identifying and disposing of assets	Ongoing	All surplus assets identified and disposal planned	Potential staffing resource issues	CPO Estates Officer	CPO

KEY ISSUE 2. LACK OF CLARITY WITH THE COUNCIL'S EXISTING IN-HOUSE MANAGEMENT ARRANGEMENTS

Required outcome: To clarify ongoing management arrangements

Action	Target Date	Performance Measures	Resources	Staff responsible	Lead Officer
4. Review the current management arrangements for each group of properties to reduce confusion and provide clarity to customers. Put together a clear guide to show who manages each asset, to be circulated to all Divisional Managers (and their relevant staff) and Members.	S = Jan 03 F = June 03	Customers clear who manages which assets	Potential staffing resource issues	CPO EO BM FDM DSM	CPO
5. Monitor the impact of the above changes. If they have not achieved the additional clarity of function, consider in more detail the issues involved in centralising asset management functions.	S = July 03 F = Dec 03			CPO & AMP steering group	CPO

KEY ISSUE 3. INVESTIGATING METHOD OF PROVISION OF ASSET MANAGEMENT

Required outcome: To establish the most appropriate method of service provision

Action	Target Date	Performance Measures	Resources	Staff responsible	Lead Officer
6. Prepare a detailed specification of asset management activities and their frequency. (Some of this has already been prepared for the baseline assessment, but in insufficient detail to allow quotes to be prepared.)	S = Jan 03 F = June 03	Detailed specification for activities associated with each group of assets prepared	Potential staffing resource issues	CPO EO BM FD DS LSM FM	FD
7. Obtain quotes from private sector companies for the management of certain assets.	S = July 03 F = Sept 03	Quotes received which are accurate enough to compare costs		CPO EO BM	EO
8. Discuss with other authorities the opportunities for managing certain assets via a partnership approach.	S = Mar 03 F = July 03	Detailed picture obtained of the scope for partnership working		CPO FD DS BM	FD
Once the above are completed:					
9. Review options and agree appropriate ongoing management approaches for different assets, in light of cost-benefit analysis.	S = Oct 03 F = Dec 03	Future management approaches agreed for each group of assets	Potential staffing resource issues	CPO & AMP steering group	CPO

KEY ISSUE 4. LACK OF MEMBER INVOLVEMENT IN ASSET MANAGEMENT ISSUES

Required outcome: To achieve Members greater understanding of asset management

Action	Target Date	Performance Measures	Resources	Staff responsible	Lead Officer
10. Review the terms of reference of the 3 policy committees, moving final decision making powers on all asset management issues to a single committee (probably Finance & Management).	S = Oct 02 F = Feb 03	New terms of reference agreed		LSM CPO CE	LMS
11. Consider, in consultation with officers and Members, the future inter-relationship between the committees to ensure that appropriate input on asset management matters is retained.	S = Oct 02 F = Feb 02	New terms of reference agreed		LSM CPO CE	LMS
12. Consider Member involvement in the revised Asset Management Steering Group/Capital Programme Working Group arrangements.	July 02	Revised arrangements in place		CPO CFO CE	CPO

KEY ISSUE 5. DISATISFACTION WITH THE REPAIRS AND MAINTENANCE SERVICE

Required outcome: To improve customer satisfaction

Action	Target Date	Performance Measures	Resources	Staff responsible	Lead Officer
13. Make initial improvements e.g improve communication by sending a confirmatory letter to the building occupier	July 02	System of letter provision up and running		BM	
14. Undertake a full review of the Repairs and Maintenance Service, to cover the concerns raised.	S = Jan 03 F = July 03	Improvements effected which satisfy concerns of all customers	Potential staffing resource issues	BM	BM
15. Implement planned maintenance programmes for all assets.	S = Sep 02 F = Dec 02	Planned Maintenance programmes in place	Possible additional budgets required	BM	BM

KEY ISSUE 6. LACK OF CENTRALISATION OF ASSET DATA

Required outcome: Improved management capabilities

Action	Target Date	Performance Measures	Resources	Staff responsible	Lead Officer
16. Work with IT to develop an action plan to implement greater centralisation of asset data.	S = May 02 F = Oct 02	Action plan in place	Likely to be budget implications	GIS working group to oversee this IT, CPO, EO	IT

KEY ISSUE 7. A RANGE OF ISSUES RELATING TO THE CIVIC OFFICES

Required outcome: Achieve the efficient use and management of the Civic Offices

Action	Target Date	Performance Measures	Resources	Staff responsible	Lead Officer
17. Confirm with reference to the local property market why the Civic Offices should be retained as the base for the Council's activities.	Jan 04	Agents consulted		EO	EO
18. Explore alternative management arrangements with Facilities Management companies.	S = Mar 03 F = July 03	See key issue 3 above		CPO BM	CPO
19. Undertake an Energy Audit and examine incentives for building users to reduce running costs.	S = Feb 04 F = July 04	Audit completed Feasibility of introducing incentives confirmed	Potential staffing resource issues	BM CFO	BM
20. Review Cleaning & Caretaking functions and obtain alternative quotes for delivery of those services.	S = Mar 04 F = Oct 04	Alternative quotes obtained	Potential staffing resource issues	BM	BM
21. Identify the amount and position of surplus space, plus the degree to which floorspace standards are being met.	S = Sep 02 F = Dec 02	Figures obtained	Potential staffing resource issues	BM	BM

Action	Target Date	Performance Measures	Resources	Staff responsible	Lead Officer
22. Calculate the cost of moving people/partitioning v the income which might be achieved. Also consider further the introduction of asset rents to encourage building users to minimise space used.	S = Jan 03 F = Apr 03	Figures obtained Feasibility of asset rent introduction confirmed	Potential staffing resource issues	BM CPO CFO EO	CPO
23. Continue to seek out suitable organisations for property sharing.	Ongoing	Possible property sharers identified		CPO EO	CPO
24. Investigate issues affecting the work environment.	S = July 04 F = Dec 04	Recommendations for improvements		BM	BM
25. Develop a home-working policy.	S = Aug 02 F = Dec 02	Policy in place		PD	PD
26. Review disability access issues for the Civic Offices and for all public buildings across the district	S = Jan 03 F = July 03	Action plan in place to implement minimum requirements of DDA		BM	BM
27. Develop a suitable forum for ongoing staff consultation / raising of concerns.	S = Mar 03 F = July 03	Forum in place		BM PD	PD

KEY ISSUE 8. INSUFFICIENT PERFORMANCE MANAGEMENT DATA AND COMPARISON

Required outcome: To be among the better performing authorities

Action	Target Date	Performance Measures	Resources	Staff responsible	Lead Officer
28. Review the Council's performance using those asset indicators currently monitored and assess how performance can be improved.	S = Sep 02 F = Dec 02	Performance reviewed Improvement possibilities identified	Possible resource implications	BM FD TS	FD
29. Ensure that information to enable the 5 property performance indicators (pPI's) to be monitored is obtained and analysed by July 2002.	July 02	Performance on the 5 PI's reported in July 02 AMP		CPO CFO BM	CPO
30. Following submission of all authorities AMP's in July 2002, benchmark against a number of other authorities and ascertain those in the top 25%.	S = Nov 02 F = Feb 03	Top 25% performance identified, plus that of other benchmarking partners		CPO	CPO
31. Implement measures to improve our performance to meet these targets.	S = Mar 03 F = Nov 03	Action plan developed and improvements commenced	Possible resource implications	CPO BM CFO	CPO

DRAFT PERFORMANCE INDICATORS

SDDC Strategic Objective	SDDC Property Objective	What needs to be measured?	Suggested Indicator
To provide leadership to the community involving all citizens in decision making	To consult the community on the best use of assets via Best Value reviews and the published Consultation Strategy contained in the Best Value Performance Plan	Stakeholders' satisfaction with accommodation: 1. Suitability 2. Sufficiency 3. Condition 4. Cost	<i>No of formal consultation exercises with stakeholders per annum</i> <i>No of actual changes as a % of changes requested through consultation exercises</i> <i>Interpretation of the results of any stakeholders' satisfaction surveys into continuous improvement programme</i>
To promote the sustainable economic and community development of South Derbyshire addressing social exclusion and equality of opportunity	Look at opportunities to use Council assets as a contribution to economic and community development schemes developed in partnership with other organisations	Whether assets are being used in partnership schemes	% of assets used in partnership schemes
To protect and promote a sustainable environment	Examine the use of land and property held by the Council and seek to improve the use and look of under utilised land	Assets are being reviewed on a regular basis	Is a review strategy in place? % of assets being reviewed each year
To identify and address the transport needs of the District	Utilise assets relating to public transport in such a way as to encourage and promote new transport initiatives	Whether appropriate assets are being utilised for these purposes	Paul Evans to determine indicator
	Enhance the value of recreational and indeed other assets to reduce the need to travel to attractions outside the district and bring services closer to their users	Whether assets are being improved to help achieve this objective	Number of assets improved (and % of total)

SDDC Strategic Objective	SDDC Property Objective	What needs to be measured?	Suggested Indicator
To secure high quality value for money services	Reduce costs of management and realise better returns (where these returns will not contradict other objectives of the Council, such as support for small businesses)	Income received compared with annual target	% of under or over performance related to target income level
		Voids	<i>Number of units void as % of total</i>
		Rent collection	<i>% of rent collected from let units per annum</i>
		Management costs	<i>Annual management costs as a % of annual rental income</i>
		Rate of return compared with target	<i>Current internal rate of return for the portfolio expressed as an average for each class of investment</i>
		Management costs	<i>Annual management costs per sq m per user type</i>
	To maximise the efficient use of assets and ensure that they meet current and future needs	Property condition	<i>% of floor-space in each of physical condition categories A, B, C, D and in priority levels 1-4</i>
		Running costs (repairs & maintenance, energy, water, rates & taxes, grounds maintenance, cleaning & caretaking, security)	<i>Running costs per sq m for each type of use</i>
		Space utilisation	<i>No of users per sq m for each type of use in occupational property</i>
		Occupancy costs	<i>Occupancy costs per sq m</i>
	To identify and efficiently dispose of any surplus assets, any receipts being used for the good of the community in South Derbyshire	Whether surplus space has been identified	<i>Occupational space declared surplus as a % of total space</i>

SDDC Strategic Objective	SDDC Property Objective	What needs to be measured?	Suggested Indicator
To work in partnership with organisations in the public, private and voluntary sectors to promote the safety, welfare and quality of life of the community	Look at opportunities to maximise use of Council buildings and provide one-stop services by locating other partners within Council buildings	Improvement in the delivery of new capital projects against set time and budget targets To what degree other partners are located in Council buildings.	<i>Annual value of new capital projects finished on time and on budget as a % of total annual value of new capital projects</i> No of partners located in Council buildings % of overall floorspace used by partners
	Devolve the direct management of assets to the community providing where possible security of tenure through long term leases	That management of assets has been devolved where possible	% of facilities whose management has been devolved to the local community on long term leases
	Create where possible appropriate user groups for major assets	That user groups for each type of asset exist or are being created (where possible)	% of asset types where user groups exist
To train and develop all our employees in order to achieve these objectives for the people of South Derbyshire	Provide a safe and healthy working environment for staff	The health and safety of the working environment	Risk assessment strategy in place

