

## ASSET/ESTATE MANAGEMENT: UPDATED ACTION PLAN NOVEMBER 2006

REQUIREMENT	WHAT CURRENTLY EXISTS	PROGRESS TO DATE AND ACTION REQUIRED	PROPOSED TIMETABLE and OUTCOMES
<p>The Council needs an annual programme of planned maintenance based upon a rolling program of property surveys and to have assessed the level of backlog of maintenance.</p> <p>The Council's capital program gives priority to potential capital projects based on a formal, objective approval process.</p> <p>The need to ensure that assets are fit for purpose through adequate provision of maintenance, repair and budgeting.</p>	<p>Working with Derbyshire County Council, detailed stock condition surveys have been completed for 10% of the portfolio that is representative of a mix of properties that the Authority holds. Results have been compiled and a 5 year action plan and strategy document has been produced using the information we have at this moment in time, which is being improved with the continuation of property surveys for the remainder of the portfolio and resurveys as appropriate.</p> <p>The Council's capital programme does give priority to potential capital projects, based on a formal, objective approval process.</p>	<p>Substantial progress has been made in this area since the production of the 2005/2006 Asset Management Plan, some stock condition surveys are now in place and the Council has approved a 5 year action plan.</p> <p>Members have been advised on the potential level of backlog of maintenance based upon the information we have, which will be subject to further improvement. They have approved a plan to address planned maintenance given the information available at this moment in time and add to condition survey data. Funding has been pledged to carry out further surveys on a rolling basis and progress a planned maintenance program. This will be subject to further revision and scrutiny when the results from future property surveys are known.</p> <p>Expenditure will be prioritised and opportunities for disposal or improvement of corporate asset use will be considered after review of data.</p> <p>High priority planned maintenance work is due to be commissioned shortly based upon the results of the surveys carried out. The whole program will be reprioritised and reviewed in the future once the results of further surveys are known. This will be linked to budgeting and finance requirements, other service, maintenance requirements and spending.</p>	<p>December 2006: Further surveys commissioned for 20% of the portfolio.</p> <p>March 2007: Results from stock condition surveys provided, inputting on Asset Management software.</p> <p>Upon completion of surveys: A program for resurveys produced and being implemented to keep data up to date.</p> <p>Service Managers to benchmark the cost of owning and managing their assets when undertaking their service reviews.</p> <p>Please refer to appendix 2 for detailed information concerning our action plan and 5 year strategy.</p>

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<p>The Council has an up to date asset management plan (AMP) that details existing asset management arrangements and outcomes and the planned action to improve corporate asset use.</p>	<p>The AMP has been updated to reflect the current situation and progress to be made.</p>	<p>The AMP is a working document that will be subject to change once improvements have been made and where there is a change in policy and service requirements.</p>	<p>Ongoing review of AMP when changes required.</p>
<p>The Council maintains an up to date asset register.</p>	<p>Map info: this displays plans over which information is displayed and forms the basis for the Council's terrier system.</p> <p>Property management records no longer exist in a variety of formats and locations and all records have been centralised onto one file as far as we are aware.</p> <p>The Council has purchased software called Asset Manager to develop with a view to handling property data and to ease the decision making process.</p> <p>Information from the former Greenley system has been transferred into an access database and used as a point of reference only when asset manager has been populated.</p>	<p>Substantial progress has been made in this area since the production of the 2005/2006 Asset Management Plan. Asset Manager has now been purchased and is being populated. Short-term resources have been commissioned to gather all property information and validate what data currently exists, and add the verified data into Asset Manager. In addition, applications for first registration are being submitted to the Land Registry. As part of this exercise, the terrier is being amended by the Council's Legal Department, in conjunction with Property Services. Longer term, the Council will need to keep all corporate property data up to date in the future, given ongoing changes when property is sold, purchased or there is a change in the data held. This exercise will review Corporately how all-corporate data that relates to Council owned assets could be held centrally (information that exists within the planning and I.T. departments for example).</p>	<p>Ongoing:</p> <p>Property records will remain subject to continuous validation and updating.</p> <p>Eventually information as to land ownership may be available in reception and on the internet. Customer services also have access to the system and handling telephone ownership enquiries.</p> <p>All property management records are to be held on one system that will highlight casework requiring action. This can be compared regularly against the current case list and any outstanding work can be dealt with.</p> <p>The Council can also plan for any tenant options to break or other events that will have financial implications on budgeting.</p> <p>By December 2006: The full contents of the Council's Asset Management system to be reviewed, together with any other property management records.</p> <p>A further review will be undertaken to consider what information is still required and what information can be utilised.</p>

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<p><b>The Council makes investment and disposal decisions based upon thorough option appraisal and whole life costing.</b></p>	<p>Suitability and sufficiency templates produced but not developed.</p> <p>User satisfaction surveys have been circulated for Civic Offices and as a result an office moves program have been implemented.</p>	<p>The Council will carry out whole life costing appraisal and option appraisal on all schemes where appropriate.</p> <p>Again this relies upon the existence of accurate information upon which decisions can be made. This is being improved with a view to Corporately working towards this in the future.</p>	<p>By June 2007: The Council will have in place a format for decision-making agreed by members and Corporate Management team and circulated to all staff members affected.</p> <p>By April 2008: Major assets to be assessed against suitability and sufficiency analysis.</p>
<p><b>The Council's arrangements for reporting to members are sufficient to fulfil their responsibility in relation to the Council's land and buildings portfolio at both strategic and service level.</b></p>	<p>The Council does have a dedicated member who is responsible for property and does report to members on property issues.</p> <p>The Council has an Asset Management Working Party forum set up, which consists of representatives from service departments as well as the member responsible for Property, Head of Finance, the Director of Corporate Services and the Corporate Asset Manager. Issues are raised in this forum.</p> <p>The Council's Finance and Management reviews property issues, as they are included within the terms of reference in the Council's constitution.</p>	<p>A report has been approved by Committee and Corporate Management team, which highlighted key areas for improvement. Funding has been provided to make whatever progress is possible short term.</p> <p>As part of this, resources have been commissioned to verify and update existing data as well as to complete missing data and provide software.</p> <p>This information continues to be reviewed and revised details need to be reported to members on a regular basis.</p>	<p>By December 2006: The full contents of the Council's Asset Management system to be reviewed, together with any other property management records.</p> <p>A further review will be undertaken to consider what information is still required and what information can be utilised.</p>

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<p><b>Disability Discrimination Act 1995 (DDA): Works required to comply.</b></p>	<p>According to current records, all of the Council's owned property from our existing asset register has been surveyed. Any other properties not found to be included on this list may be surveyed at a later date.</p>	<p>Proposed works have been split into phases. All work in phase 1 of the project has now been completed. Phase 2 of works to be commenced shortly.</p> <p>Further phases of works need to be considered and prioritised on a rolling program.</p>	<p>November 2006 to February 2007: Phase 2 of works undertaken and completed.</p> <p>By February 2007: Phase 3 prioritised with Client consultation and involvement.</p> <p>By June 2007: Phase 3 documentation prepared and contractors instructed.</p> <p>By October 2007: Works commence on phase 3.</p>
<p><b>Reviewing Policy on domestic land disposals.</b></p>	<p>General policy on not to sell public open space unless there are "extenuating circumstances". Also internal departments may not want to sell.</p>	<p>The Council did recruit an officer to deal with domestic land sale issues and generally support the team. This was a one year temporary contract, which has now expired.</p> <p>As a result, the initial backlog of cases has now been assessed and substantially reduced. The remainder of cases and any new ones have now been reviewed and prioritised.</p> <p>Proposed review of whether a charge is made for dealing with applications is still to be investigated.</p>	<p>Ongoing.</p>

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Overall disposals and Corporate Disposals Policy.	The Council now has now approved and adopted a general Corporate Disposals Policy for the disposal of surplus assets.	A number of assets have been identified as suitable for disposal and cases have progressed to Committee in line with this policy. The Council's Corporate Disposals Policy needs to be reviewed on a regular basis and approved by members. This will provide a benchmark to aid the decision making process. All individual cases will be judged on their own merits against this policy. With the benefit of improved property data, the Council intends to link such decisions to thorough option appraisal.	Ongoing: A constant review of property data and disposals policy is required.
Benchmarking - review and develop PI's.	Performance indicators based upon current information. These have been benchmarked with other local authorities within the area.	2005 - 2006 indicators to be revised, presented to members and appended to this Asset Management Plan at a later date.	By September 2007: All existing performance indicators revised for 2006/2007.  Figures are benchmarked with other authorities.
Regular review of Asset Valuations.	2006 Asset register that requires continuous modification.	Assets will be re-valued each year on a rolling program.	By December 2006: Assets to be included within the March 2007 revision to be identified and valuations commenced to update.  By March 2007: Up to date asset register produced.
Resources for Property and Estate management.	The Council has tried but not been able to recruit to the full time position of Property Surveyor. Therefore short term temporary staff are currently being employed	How the Council delivers the property management service in the future is has been fully reviewed and following a Committee resolution, a recruitment exercise has commenced. Approval has been given to outsource or go out to the market should in house recruitment not be possible.  In terms of marketing, the Council has worked a neighbouring Authority to conduct a joint procurement exercise to instruct an external agent to market vacant property.	By January 2007: Should the Council not successfully recruit, the Council will be looking to the market to meet the demands of longer term service delivery.

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<p>Develop a set of performance measures to evaluate asset use in relation to corporate objectives and fully utilise option appraisal and whole life costing techniques.</p> <p>Consider opportunities to share assets with other occupiers and develop a home working policy if practical.</p>	<p>The Council already shares part of the Civic Offices with the police and a number of Housing properties are shared with other corporate occupiers.</p> <p>A Tourism partnership involving all the National Forest authorities has been developed, which involves neighbouring District Councils using their Tourist Information Centres (TIC's) to promote South Derbyshire.</p>	<p>Performance measures are to be developed.</p> <p>Once the Council has a full appreciation of what assets it holds, has knowledge of the full costs of ownership and has carried out suitability and sufficiency studies, more options can be explored further.</p> <p>The option of a home working policy needs to be addressed at Corporate Management team level. It is believed that initial discussions with managers highlighted that this concept may not be achievable in practical terms, but the issue requires thorough research.</p>	<p>Ongoing.</p> <p>By April 2008: Major assets assessed against suitability and sufficiency analysis.</p>
<p>The commissioning of Fire Risk Assessments in line with the Regulatory Reform, Fire Safety Order of 2005</p>	<p>The onus has now moved from the Local Fire Authority to the on site occupier of a building to ensure that they have carried out fire risk assessments and followed any required courses of action highlighted therein.</p>	<p>Occupiers of non-operational property have been advised that they are responsible for compliance with the new legislation.</p> <p>Properties for which the Council needs to commission Fire Risk Assessments have been identified through collaboration with service managers.</p> <p>External consultants have been appointed to inspect properties and complete Fire Risk Assessments.</p>	<p>By December 2006: All Fire Risk Assessments are to be completed and provided to the relevant service/on site building managers who will take responsibility for future management. This will include implementing the recommendations set out within the assessment and revising the Fire Risk assessment as and when required (e.g. following changes to the layout of the building).</p>