

**PROPERTY SERVICES NEW WAYS OF WORKING- INFORMAL BRIEF
NOVEMBER 2023****PROPERTY SERVICES PURPOSE:**

- Protect the Council from challenge and risk (*safe to use, precedent, compliance*)
- Ensure the Council fulfils its obligations under law
- To provide a framework for all property holdings and transactions across the Council
- To act as client agent, intelligent client and Corporate Landlord
- To proactively manage assets in relation to purpose, service need and expected future
- To effectively manage assets on a day to day basis
- To enable prioritisation of requests and workload
- To review and plan what estate we need and maintain a live Delivery Programme (rationalise)
- To ensure plans are aligned with the County Plan and Service need
- Understand what else is going on across the Council and provide support
- Lead on One Public Estate across our partners assets with WVT

To achieve this, we have redesigned Property Services to provide an effective and proactive team that delivers optimum performance of the property estate.

BACKGROUND:

Recent history would indicate that the levels of staffing around Property Services has made the delivery of a proactive and effective service unsustainable. The team have been mostly reactive and have had to re-prioritise on a daily, sometimes hourly basis. The detail required to manage the volume and complexity of the day to day requirements has previously precluded strategic thinking and forward planning.

Property Services has not previously taken its rightful place of central support, guidance and delivery of service facilities due to staffing pressure and work load. Due to these pressures, communication and explanation of what the team were doing and why was lost. This was exacerbated by involvement by others who did not understand the relevance or impact of their actions (creating more work load) and a lack of standardisation along with a sense of inaction and proactive leadership. This is has now changed and Property Services are being supported to review the establishment, identify gaps in knowledge and expertise, recruit, provide capacity and implement an asset management framework to enable the effective management and planning of our assets.

The new Strategic Asset Management Plan (StAMP) and Supplementary Plans and Procedures sets out how the management of our assets meets the modern environment and need. The framework supports planning, process, instruction and provides a property presence to support Directorates in understanding their role in the effective management of assets and knock-on finances.

The property team does have an excellent mix of skills and commitment by team members and now has clarity about their purpose, priorities and what they need to achieve. The team is implementing a standardisation of approach across our dealings and rectifying past errors along with looking to the future Council requirements around property assets via the phased, Corporate Asset Review (CAR). In addition, it is standardising the management of the commercial portfolio and working to create a vibrant and thriving city centre facility at Maylord Orchards.

A summary of the property assets is here for reference:

Property Type	No. of assets	Property Type	No. of assets
Bus stations	2	Social housing properties	56
Car parks	54	Industrial units	150
Travellers site	7	Retail	59
Care premises	17	Sports/leisure	20
Crematoriums /cemetery	6	Libraries/museum	13
Children's centres	8	Office / MAO	32
Community /day centres	10	Smallholdings /land	11
Depots	10	Toilet premises	19
Sewerage /pumping stations	16	Waste sites	10
School /educational premises	126	Amenity	55

IMPLEMENTATION STRATEGY:

1. Strategic Asset Management Plan- set the framework
2. Supplementary Plans and Procedures- set the rules
3. Redesign- provide the right resource
4. Corporate Asset Review- find out what we have, why and what we need to deliver a rationalisation programme so that we have the right facilities in the right place.
5. Review commercial portfolio

1. & 2. StAMP: The Strategic Asset Management Plan (the StAMP) sets the framework for the Council and its asset planning. Its Vision states: *"To make the property estate work better for the Council, its partners and communities by providing fewer, but more sustainable and adaptable buildings."*

The StAMP establishes a Corporate Landlord model across the council- vested with Property Services. A series of supplementary plans and procedures support the StAMP and allow flexibility of approach and detail to be added as required. The Supplementary Plans and Procedures are a set of rules and guidance about how we manage our assets and roles and responsibilities. This will deliver a standardised approach and minimise risk to the Council.

An Asset Management Working Group has been established with representatives from across the Council to support asset planning and information exchange. This group will build trust and knowledge, enable an exchange of ideas, collaboration and enforce the StAMP. It also feeds into the One Public Estate Government initiative.

3. REDESIGN: A re-invigorated team, with posts focused to support a turn-around of the service and bring it back in line with where it needs to be- the engine room of the organisation where accurate data and up to date service need come together:

- to manage an estate that is fit for purpose and delivers front of house services for our residents and businesses;
- to be up to date and responsive to enquiries;
- to maximise potential and income;
- to deliver against the County Plan.

We will improve links with Directorates to support, provide efficient communication and build trust-delivering and planning for the future service need.

The ideal staffing structure would be built around the following -

Asset Management	<ul style="list-style-type: none"> • Develop links with Services to develop and maintain Service AMP's • Manage the Asset Management Working Group • Work to establish the corporate need taking into account future changes • Maintain and improve data management • To take the identified Service need, asset data and develop plans and proposals for the rationalisation of the estate • Manage and implement the Delivery Programme (Implementation Plan) • Work collaboratively to manage change • Develop and manage the revised savings plan • Report on progress
Facilities Management	<ul style="list-style-type: none"> • Maintain day to day linkages on site • Understand the buildings and issues – work with Asset Management, maintenance, etc • Key role in rationalisation • Monitor contracts on site and planned works- manage contractors. • Day to day H&S and operations • First point emergency handling
Maintenance and Compliance	<ul style="list-style-type: none"> • Planning and management of programmes around regular, reactive maintenance, planned maintenance and using reactive feedback to have up to date programmes of work. • Manage and bid for capital budgets and forward plan works to optimise the governance and available timeframes, working with PMO to deliver • Effectively manage reactive works and budget • Develop and implement the Compliance Management System to fulfil legal duties • Includes Contract Management and performance – develop the new SLA with Hoople, identify R&R and identify and drive efficiencies • Maintain the condition survey programme of surveys and remedial works • Provide the briefs and instructions to Hoople • Have resource to cover site visits, design options, dilapidations, urgent issues, etc
Commercial & Investment Portfolio	<ul style="list-style-type: none"> • Undertake landlord duties and ensure estates are appealing- be a good landlord • Provide mechanisms to manage tenants • Manage debt and optimise income • Manage external agents to undertake a programme of rent reviews as well as marketing and letting duties • Develop a forward plan for improvement and potential expansion, working with Economic Development • Asset manage Maylord Orchards and Hoople operational management contract to maintain a viable enterprise in line with council commitments • Horizon scanning- manage development aspirations across the council including Housing, education, infrastructure and economic regeneration
Estates Management	<ul style="list-style-type: none"> • Ensure management plans and procedures are maintained and relevant • Provide a responsive service to asset enquiries • Maintain an up to date picture of leases- ensure rent reviews are undertaken in a timely manner and take action where required. Identify and review portfolios and ensure standardisation or approach • Manage acquisitions, disposals, leases including CAT's and ACV • Manage and advise on risk

- Horizon scan and seek opportunity to support the County Plan by utilising council assets
- Maintain the Terrier
- Support the Highways Annual Plan, capital projects and other service need

4. CORPORATE ASSET REVIEW (CAR): In order to rationalise the estate, a joined up approach is required by holding a review of the estate as a whole. A primary purpose is to take back control of our assets corporately and implement the Corporate Landlord model. Feeding into this (via a Service Asset Management Plan or SAMP) will be service need around front line delivery, a programme of rationalisation and accurate finance data around savings that can be realistically achieved. In addition, ensuring good quality, up to date detail on building maintenance requirements and programmes of work will be strengthened under the redesign.

This is especially difficult as we enter a new world after Covid. The world has changed and we need asset management expertise to work with our colleagues to answer the questions- *what does your service look like in the next 5 years? Where do you need to be, what facilities do you need?* This covers both front of house and back office. This information is then pulled together to identify sites we no longer need, plan office moves and refurbishments and create the Delivery Programme.

The Delivery Programme (the live element of the Strategic Asset Management Plan) will then be used to develop rationalisation programmes. All assets need to be reviewed and a proposal developed to manage the changes required. The programme can then be costed and funding applied for as part of the annual capital funding rounds.

1. The CAR asks the fundamentals under the SAMP:
 - What facilities do we need?
 - Where do we need them?
 - When do we need them?
2. Analyses the results and overlays against property assets
3. Identifies:
 - Gaps in assets
 - Investment required
4. Develops a rationalisation plan and seeks approval and funding
5. Delivery Programme implemented

5. INVESTMENT PORTFOLIO: The estate needed a review and active landlord management to be reinstated. The approach is set out below.

BACKGROUND

- Tenancy reviews outstanding
- Irregularities in tenancy agreements
- Inconsistent application of rentals
- Minimal internal resources
- Lack of standardisation and unfairness to tenants
- Lack of understanding around the portfolio
- Tenants don't understand property

METHODOLOGY

- Countywide review in progress
- Appointed an external agent
- Market values assessed and applied
- Standardisation of approach
- Ability to take social value into account
- Educate and support tenants
- Understand the portfolio

SUMMARY:

A substantial amount of work has been done over the last few years- to build a team, standardise process and confront previous decisions and actions that are now having an impact on the council. There is a large amount of work still to do to move forward; importantly a change in culture and establishing Property Services as the team who manage property. The introduction of the Corporate Landlord model and StAMP is an important step in reducing risk, controlling and being efficient with our assets.

There are legacy issues to be resolved but the Property Services team remain committed to working with all our colleagues to enable improvement and development and obtain the best possible outcome.