THE EXECUTIVE

Tuesday, 22 July 2003

Agenda Item 4.   **Asset Management Plan (Pages 1 - 48)**

Contact Officer: Barry Ray
Telephone: 020 8227 2134
Fax: 020 8227 2171
Minicom: 020 8227 2685
E-mail: barry.ray@lbbd.gov.uk

The London Borough of
Barking & Dagenham

This page is intentionally left blank

Corporate Asset Management Plan

2003-2004

www.barking-dagenham.gov.uk

The London Borough of
Barking & **Dagenham**

The London Borough of

Barking & **Dagenham**

www.barking-dagenham.gov.uk

Foreword by Cllr Cameron Geddes, Deputy Leader of the Council and Lead Member for Property.

It gives me great pleasure in introducing the Council's 2003 Asset Management Plan, in what has been a challenging and demanding twelve months and one which has seen enormous change to the way the Council plans, develops and delivers its asset management and property service.

The progress made in previous Asset Management Plans have this year been supplemented by, the recommendations and conclusions from the Best Value Review of Property, clarity around structure and responsibility, with the creation of the new Asset Management and Development Division, changes to the way the Council allocates and manages its capital expenditure and the internal and external communication that have taken place between Members, Officers, our partners and the community alike.

Whether you're a Member or an officer of the Council or a resident, It's an exciting time for Barking and Dagenham. The Council's Customer First initiative will significantly change and improve the way the Council interacts with its residents and service users, whilst improvements to health and social care facilities delivered jointly by the Council and the Primary Care Trust coupled with the Council's substantial capital programme will see a number of new and improved education, housing, and infrastructure developments throughout the Borough. Full advantage is being taken to engage with external partners to maximise the use of assets and deliver improved joined up community based services.

All within the Borough take great pride in the fact that Barking and Dagenham is the fasting improving Council in London (based on the Beacon Basket of Performance Indicators) and this years Asset Management Plan is aimed at building upon and articulating the changes that have not only brought us to where we are, but will pave the way for continued improvements and more efficient use of the Council's asset management and property services.

This page is intentionally left blank

London Borough of Barking and Dagenham

Corporate

Asset

Management

Plan

July 2003

Foreword by Cllr Cameron Geddes, Deputy Leader of the Council and Lead Member for Property.

It gives me great pleasure in introducing the Council's 2003 Asset Management Plan, in what has been a challenging and demanding twelve months and one which has seen enormous change to the way the Council plans, develops and delivers its asset management and property service.

The progress made in previous Asset Management Plans have this year been supplemented by, the recommendations and conclusions from the Best Value Review of Property, clarity around structure and responsibility, with the creation of the new Asset Management and Development Division, changes to the way the Council allocates and manages its capital expenditure and the internal and external communication that have taken place between Members, Officers, our partners and the community alike.

Whether you're a Member or an officer of the Council or a resident, It's an exciting time for Barking and Dagenham. The Council's Customer First initiative will significantly change and improve the way the Council interacts with its residents and service users, whilst improvements to health and social care facilities delivered jointly by the Council and the Primary Care Trust coupled with the Council's substantial capital programme will see a number of new and improved education, housing, and infrastructure developments throughout the Borough. Full advantage is being taken to engage with external partners to maximise the use of assets and deliver improved joined up community based services.

All within the Borough take great pride in the fact that Barking and Dagenham is the fasting improving Council in London (based on the Beacon Basket of Performance Indicators) and this years Asset Management Plan is aimed at building upon and articulating the changes that have not only brought us to where we are, but will pave the way for continued improvements and more efficient use of the Council's asset management and property services.

Photograph

Corporate Asset Management Plan 2003

Contents

Section 1 – Organisational Arrangements for Corporate Asset Management

1.1   Introduction

The Council has made great strides since the 2002 Asset Management Plan (AMP) in ensuring the asset management process is developed, communicated, properly structured and resourced, supportive and makes a real difference to the way the Council manages, maintains and utilises its property asset and land portfolio. In addition, substantial progress has been made to ensure the systems and processes that help drive and deliver good asset management practice is embedded throughout the organisation.

Last years Corporate AMP highlighted some of the key drivers to the success of this process, these were –

- The creation of a new Asset Management & Development Division – bringing together both the strategic, delivery and corporate asset management role.
- Improvements from the Best Value Review of Property, which concentrated on the way the Council uses, manages and controls its property portfolio.
- The introduction of a new management information system.
- Developing the internal relationships that exists within formal and informal structures and in particular the Corporate Asset Forum (CAF) and it's sub-groups.

In addition, and following the assessment of the 2002 AMP, considerable effort has been made to ensure that –

- Consultation undertaken by the Council is meaningful, communicated and leads to real participatory decision making.
- The Council has a robust approach to data that assists this decision-making.
- Performance measures take into account the stakeholders associated with asset management and that improved performance leads to continuous service improvement.
- The asset management process is properly communicated allowing Service Managers to identify their future requirements and the options that will help them deliver assets that fit the needs of the service.

other major initiatives and regeneration schemes that will contribute to this, include -

- Delivering on the Council's 'Customer First' initiative which, following a Best Value Review, aims to radically change the way the Council interfaces with the public and delivers both front line and back room contact with service users. This will have a significant impact on the Council's operational property estate (see section 5.1.1)
- The impact on services that major regeneration and development schemes will have on the Council's asset base, these include Barking Reach which will see over 10,000 new homes and the massive regeneration taking place as part of the Thames Gateway Development.
- Improvements to health and social care properties, via a number of new development under the LIFT (Local Investment Finance Trust) – se section 5.1.8.

1.2   Organisational Arrangements

The 'Framework for Corporate Property Asset Management' (see Appendix 2), adopted in 2002, continues to represent the formal asset management decision making and

communication structure and continues to reflect the key groups and processes associated with delivering the asset management process.

The roles of the individual groups outlined in the framework and how these groups integrate are explained in the following sections.

1.3   The Executive

Made up of 10 Members (including the Leader and Deputy Leader of the Council), the Executive meets weekly and is responsible for decision making on matters, which are not otherwise delegated. Items for decision are published in advance in the 'Forward Plan' to ensure Members of the public have an opportunity to attend the meeting. Contained within their portfolio, the Deputy Leader has Lead Member responsibility for asset management and property.

All Best Value reviews have Members assigned to the Project Teams and the BV Review of Property, which was undertaken in 2001/02 had three Members on the Project Team. Monitoring of the subsequent Improvement Plan is undertaken with the lead Best Value Review Member and the Lead Member for Property.

Members also discuss and agree the Council's annual budget setting and Capital Programme, which includes reference to the major schemes and the amount within the programme assigned to the Council's overall major maintenance programme, both of which are used to address the backlog of maintenance identified within the national performance indicators. Amendments to schemes that have programme and budgetary implications are reported via the Resource Monitoring Group (see section 1.9).

Prior to its submission, Members of the Executive agree the Asset Management Plan and the associated National Performance Indicators.

1.4   The Council's Management Team (TMT) / Corporate Asset Forum (CAF)

The Council's TMT is the senior management team of the Council. Led by the Chief Executive, the team meet weekly and considers both strategic and operational issues, it comprises –

- The Chief Executive
- Director of Housing & Health
- Director of Education, Arts & Libraries
- Executive Director of Health & Social Care (joint Social Services and Primary Care Trust appointment)
- Director of Leisure and Environmental Services
- Director of Finance
- Director of Corporate Strategy

The Director of Corporate Strategy has responsibility for the development and monitoring of the Community Strategy and the Director of Finance has responsibility for the Council's Capital Strategy, whilst the individual Directors have responsibility for the 66 plans and strategies the Council is required to produce. TMT, along with the DMT structure (see section 1.11) ensures that service plans and other strategies inform the asset management process.

The TMT also act as the principal asset management group known as 'The Corporate Asset Forum' (CAF). Specific quarterly meetings, as part of the TMT cycle of meetings, are set aside to discuss corporate asset management issues and reports for this meeting are prepared by the Corporate Asset Management Group (CAM). The 2003 AMP was presented,

discussed and agreed by CAF in June 2003, prior to it being agreed by the Council's Executive in July.

Draft Terms of Reference for CAF were set out in Appendix II of the 2002 Asset Management Plan. These were formally adopted in Autumn 2002 (See Appendix 3).

1.5   The Corporate Asset Management (CAM) Group

To assist CAF in taking asset management decisions, a corporate officer based group was set up in September 2002 with the purpose of forming corporate judgements and decisions on all Council wide corporate asset and property based issues ensuring that linkages are made between departmental service areas and corporate asset management (AM) work. The Group allocate quality time to AM issues ensuring that robust and significant challenge is given to reports from Officers, so that CAF are able to make improved and informed judgements. Equally, the Group is free thinking, encouraging creativity and innovation in relation to solving asset management issues and ensuring these are communicated uniformly across the Council. Improved working relationships across the departments has been achieved through the commitment of both CAM and CAF (see section 1.4).

Chaired by the Head of Asset Management and Development (also the CPO), this Corporate Asset Management (CAM) Group, has a cross Departmental and service perspective and consists of senior managers from each service area, including Corporate Strategy and Finance. Membership often rotates between officers within Departments ensuring a true cross section of ideas and influence. The AMP was discussed and agreed by CAM in June.

Formal terms of reference were adopted in 2002 and the Group meet fortnightly

1.6   The Corporate Property Officer (CPO)

The role of the Corporate Property Officer (CPO) now resides with the Head of Asset Management and Development, following the appointment to this post in December 2002. Reporting to the Director of Leisure and Environmental Services, the CPO also chairs the Corporate Asset Management (CAM) Group (see above section), attends the Resource Monitoring Group meetings (see section 1.9) and has the corporate capital programme management role and direct links with the corporate asbestos management group and currently chairs this Group. The CPO has close links with Head of Customer and sits on the corporate working group making the formal connection between asset management arrangements across the Council with the Customer First initiative. The CPO also mets monthly with the Deputy Leader, lead Member for property.

Details of the extensive work undertaken to ensure the role of the CPO has been communicated are outlined in section 1.13.

1.7   The Asset Utilisation Group (AUG)

As outlined in the 2002 Asset Management Plan, the Asset Utilisation Group (AUG) provides the principal group for discussing office accommodation to enable a positive approach towards the appropriate use of the Councils operational premises, excluding schools and council housing.

Consisting of a manager from each Council Departments, the group gives an operational perspective on the Councils administrative and service delivery assets. It also acts at the initial point of contact for all new requests for additional or major office accommodation changes. The Group also helps to co-ordinate the individual Service Asset Management

Plans (SAMP's, see section 5.1.6) ensuring they continue to reflect the reality of what can be a fast moving and fluid environment.

Chaired by a Senior Manager within the Corporate Estates & Property Team, who is also a member of CAM, the Group meet monthly and during 2002/03 have been successful in –

- Producing a pro-forma for requesting additional office space, which ensures managers consider a range of options within their existing space. This is now in use throughout the Authority (see Appendix 7)
- Reviewing and updating the Council's Asset Register.
- Undertaking property reviews in multi-occupancy buildings.
- Using the results of the staff questionnaire undertaken for the Best Value Review of Property to support bids for major maintenance and make recommendations for internal accommodation changes.
- Collating information in assist in updating space standards.

The group also discusses the use of premises between departments and feeds these changes into the Corporate Asset Management (CAM) Group to ensure the optimum use is made of each property. The Group is also used to pilot of number of property based initiatives, including reviewing space standards. All this work ensures that premises are not retained unnecessarily.

Each major municipal building also has an established House Committee, which is involved in the day to day running of the building. The chair of each house committees feeds into the AUG. With strong links through its service representation this group is able to reach out to individual service managers and ultimately occupiers and users of property.

Agenda items for the August and September AUG meetings will include the setting up of a dedicated section on the Council's intranet regarding the work and processes of the Group, the provision of information to the Customer First project team and identifying management reports that may be required from the 'Evolution' database (see section 2 on Data Management).

1.8 The Capital Investment Panel (CIP) and the Capital Programme Management Office (CPMO)

The processes and systems used to produce, assess, prioritises, manage, monitor and deliver the Council's its capital programme has been under major review (see section 5.1.4)

The role of the Capital Investment Panel, which is represented by officers from all Council Departments, is chaired by the CPO, is to and appraise and challenge schemes submitted on the Project Pro-formas, for inclusion within the Capital Programme.

Application for inclusion of projects into the capital programme are made via pre defined pro-forma's (See appendix 6), since the introduction of the Capital Programme Office (see section 1.10) this process is currently being revised by both the Corporate Asset Management (CAM) Group (see section 1.5) and the Mnager of the Capital Programme Mnagement Office. Pro-formas are required for every scheme, which includes reference to alternative options, linkages to Community Priorities, the Council's Scorecard and Service Scorecards (see section 4.1) and outlines the effects on the service, should the scheme not proceed.

Bids are then evaluated by the CIP and recommendations made to CAF, before submission to the Executive for approval as a final programme.

An external partner was appointed in April 2003, to help develop programme management capability within the Council and to set up and train an internal programme management team. This Manager has already been seconded into this team and further appointments are being made during July 2003 that will form the Capital Programme Management Office (CPMO).

An early part of the review included a comprehensive assessment of the organisational environment, business processes utilised, organisational structures, key stakeholders and management systems across the full lifecycle of projects within the Capital Programme. This review which benchmarked Barking and Dagenham programme management against current best practice models, where there is a clear distinction between the sponsorship function (owner of the capital budget, accountable for feasibility and the business case and responsibility for the authorisation process) and the delivery function (ownership of service area project portfolios, accountable for successful project management and delivery) with a Programme Management Office to ensure consistent reporting and management information and to co-ordinate and facilitate the relationship between sponsor and delivery teams, improving the overall governance of the programme.

1.9   The Resource Monitoring Group

In conjunction with the Corporate Finance Group, the CPO meets monthly with the Deputy Leader to assess progress on the capital programme monitoring process and land disposal programme. This is then reported to the Chief Executive and quarterly to the Executive

As a priority the CPMO (see section 1.8) with the assistance of our external partners has introduced a management reporting system that highlights, at departmental level, poorly performing projects. The Exception Reports utilise a simplistic Red, Amber, Green (RAG) status for all projects within the Departmental programmes. This system enables busy managers to focus their attention only on projects where risk of under spend or overspend is highly likely. A RAG status of red indicates an under/over spend greater than 25%; amber indicates an under/over spend less than 25% but greater than 15% and green indicates an under/over spend less than 5%. A commentary for projects showing a status of red or amber is included, based on consultation with the respective departments. The reports enable the Resource Monitoring Groups to recommend fast effective action to maintain the capital programme spend.

1.10   The Asset Management and Development (AMD) Division

At the time of writing the 2002 Asset Management Plan, the new Asset Management and Development (AMD) Division was in the process of being created. One year on, considerable progress has been made and the Division is now embedded within the structure of the Leisure and Environmental Services Department.

The AMD Division was created in direct recognition of the need to co-ordinate both the strategic asset management agenda with core delivery elements to ensure a consistent and coherent approach. The Division consist of 5 areas are shown in fig 1.
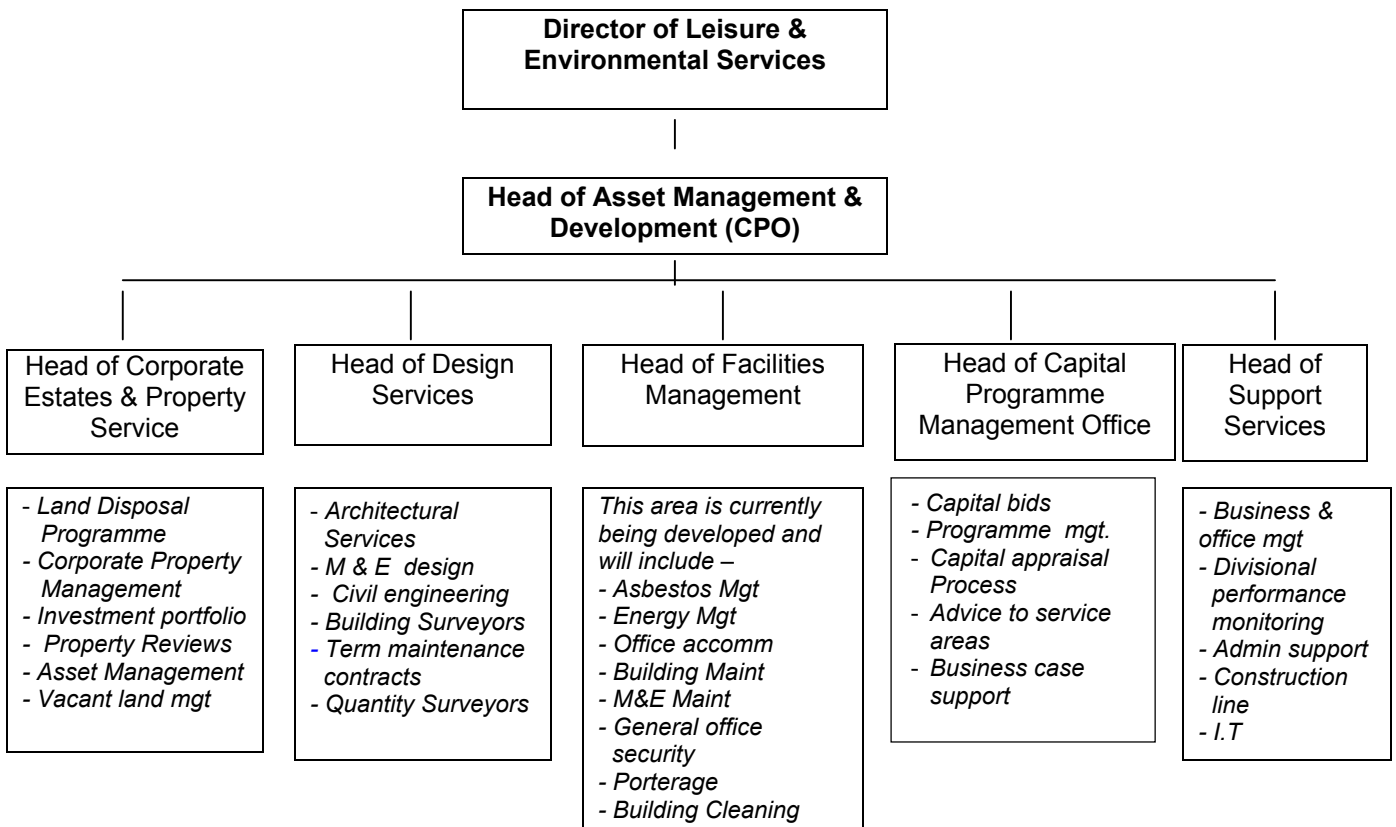
Fig 1

1.11 Departmental Management Teams (DMT's)

Each Department have their own Departmental Management Teams (referred to as DMT's) consisting of a number of number of Heads of Service. Led by their respective Directors and usually meeting on a weekly basis, the DMT's discuss both policy, strategic and service delivery issues.

To ensure the asset management process is communicated across the Council, the senior managers on the CAM group (see 1.5 above) report back to their respective DMT's on a regular basis.

1.12 Links to Area Management Structures and Community Forums

In order to bring the localised delivery of services in line with structures for engaging local residents the Council have aligned (following new ward boundaries in May 2002) area-based structures for service delivery and management. The Council has six Community Forum areas each comprising a number of Wards. This allows the Council to report on the performance of localised services to both Ward Members and Community Forums. Asset management issues, as they affect the community are taken to these forums, examples of which include the extensive consultation undertaken at all of the six forum on the decision to locate a new Council cemetery and a presentation given to another forum concerning the use of a Council owned sports facility by an under 18's community football club.

1.13 Communicating and Promoting Asset Management and the CPO

As can be seen from the structure and role of the above groups, considerable effort has been made to ensure the principals, roles and responsibilities of good asset management, the role of the CPO and the importance of the 'Framework for Corporate Property Asset Management' (see Appendix 2) have been, and continue to be, effectively communicated and promoted at every level throughout the Council and through the partnerships undertaken by the Council. The main aim since last years AMP has been to adopt and deliver a proactive approach to asset management via the CPO, AMD Division, CAM and AUG groups.

Evidence of this communication have included -

- A presentation by the CPO to the Council's Service Heads Team Meeting (March 2003).
- Presentations by CAM Members to their respective Council's Departmental Management Teams (between February & April 2003).
- Dedicating one of the Council's quarterly management briefings (attended by over 100 of the Council's senior managers) to the principals and developments in asset management / project management and the capital programme (June 2003).
- A checklist related to asset management and property now forms part of the Council's Service Scorecard Pack, issued to all Scorecard holders (see Appendix 4).
- Land disposal targets associated with the Community Strategy Steering Group action plan delivering the 'Regenerating the Local Economy' Community Priority.
- A presentation by the CPO to a group of staff located within one of the Council's main administrative offices, as to the benefits of greater space utilisation.
- The quarterly meetings between CAF and CAM and regular meetings between the CPO and the Lead Member for Property and Chair of Scrutiny Panel.
- The 2003/04 Service Scorecard for the AMD Division.
- AUG challenging requests for additional accommodation, to ensure existing space is being maximised.
- Regular cross departmental; meetings on the Council's land disposal programme and its links to both the Council's capital programme and other Council strategies (ie-Education requirements, housing developments etc).
- Corporate workshops re- improvements of capital appraisal process.

1.14 Property Reviews, Challenging Assets & Shared Use

Significant emphasis has been directed at and major progress achieved, in respect of challenging the use of existing property, better utilisation of existing assets and developing shared use properties, since last years AMP. This has been aimed at achieving many of the principals contained within the Audit Commission guidance 'Hot Property' and to ensure this has a positive benefits on the Council's operational estate.

Principally led by the Asset Management Division, this can be evidenced by -

- Using a surplus day centre as a temporary home for a number of voluntary sector groups in order to affect a multi-million pound Education PFI scheme and short term accommodation decants. A project manager is working in consultation with Borough wide Voluntary Groups with the aim of assisting them develop a longer-term property solution. Once these and other services on the same site have been re-provided (by 2005) the centre will be sold. In the meantime, the building is in use, thus reducing the need for costly security.
- A feasibility study has been undertaken of a surplus residential home with a view to exploring options to future use, including additional office space (in order to free up and dispose of other smaller sites) and key worker housing.

- The Council is working with the Barking and Dagenham Primary Care Trust on a number of LIFT (Local Investment Finance Trusts) schemes. Work on two new multi GP health centres on land purchased from the Council will commence in the Autumn of 2003 with two other sites in 2004.
- A member of the Corporate Property Team is currently providing strategic asset management support to the Social Services Department, plans identified via the SAMP process (see section 5.1.6) will see a reduction in the Social Services property portfolio, with significant improvements to the properties being retained. (see section 5.1.5 for further information on the AM support given to Social Services).
- Following the integration of Social Services with the Primary Care Trust to provide a joint health and social care service, work on a joint asset and accommodation strategy commenced in March 2003.
- Challenging the continued occupation by the Council's Parks Constabulary of a prime site with residential potential. Selling the site would provide a significant capital receipt for the Council and an improved facility for the Constabulary elsewhere in the Borough.
- The shared use of a commercial office block for both Education and a multi-agency team Youth Offending Team consisting of Social Services, Probation Services and PCT practitioners alongside Police officers. This enables, not only joined up service provision, but shared set-up and running costs.
- A partnership between the Council and Barking College which will see the remodelling and refurbishing of the Council's 40 year old municipal assembly hall/theatre. Opening in September 2004, the 'Barking Broadway Theatre Company', set up as a trust, will provide a base for the School of Performing Arts.
- A new Sure Start community centre facility on the Council's Thames View Estate, which combines a parent and children's Sure Start facility with a new public library, computer facility as part of the Adult College of Barking and Dagenham and a youth support and development service.
- Review of principle civic accommodation looking at space utilisation, introducing flexible working, hot desking, home working within the annexe of one of the Council's main administrative buildings with full consultation with staff and links to the Customer First initiative.

1.15   Links to Other Strategies / The BVPP / Community Strategy

The principal of good asset management linked to future capital funding impacts right across the Authority and, building on the progress made since last years AMP, is featuring in a number of areas throughout the organisation. Progress and improvement of the BV reviews that relate to asset management are outlined in the Council's Best Value Performance Plan '*Futures 2003/04*' document. A number of the twenty-nine Council Scorecard Performance Indicators for 2003/04 relate to capital and asset priorities and the targets contained within the working groups delivering on the Council's Community Strategy targets include specific capital and asset related deliverables.

The Council's and Service Scorecards (see section 4.1) will also be the Council's starting point in developing Public Service Agreements (PSA) . A number of targets have already been agreed with the ODPM for inclusion in the Council's PSA and these are currently with Ministers for final agreement.

Section 2 – Data Management

2.1   Asset Register & Data Requirements

Current core data continues to be principally held using detailed Excel spreadsheets, linked to the Council's central asset database. A review of core data was undertaken following the 2002 AMP and comprehensive information including UPRN's (consistent with the National Land Property Gazetteer UPRN), GIA's, condition information (collected from Asset Surveys undertaken on each operational property in 2002), DDA Audits (undertaken by the Council's Access Officer) is now held on all of the Council's operational buildings and investment properties. This is an increase on the 90% referred to in the 2002 AMP.

A review of the quality of the data held has also undertaken since the last AMP led by the Corporate Property Team, in order to check and confirm both the robustness and accuracy of the information held. Members of the AUG (see section 1.7) were involved at a Departmental level, ensuring no building was missed. The council is therefore confident as to the validity of the information, having been cross checked with existing data held by service departments, information on the SAMP forms and the Council's Land Terrier (to confirm boundaries)

A similar exercise was undertaken for the Council's commercial investment portfolio during October and November 2002, whereby detailed data (including lease information) held on each of the Council's commercial property was reviewed. This information is currently being transferred onto the 'Evolution' management information system (see section 2.2).

Site photographs are also now available on all the Council's main operational estate and investment properties, which will be linked to the data held on the 'Evolution' system. Suitability Information taken from the SAMP forms (see section 5.1.6) completes the data currently being held on spreadsheets, awaiting entry onto the new management information system.

The asset survey information referred to in the 2002 AMP is now being supplemented by full condition surveys on all the Council's operational buildings, based on an initial three-year cycle. The required funding was secured, via a report to CAF in March 2003 and the initial phase of condition surveys have already been undertaken. Information on the survey is entered onto hand-held computers, as the survey is carried out. This is then downloaded onto the 'Evolution' system back in the office. Maintenance backlog information is then calculated based on a schedule of rates within the condition survey module and the cost of backlog maintenance within each category to be more accurately calculated, leading to further improvements in the quality of the Council's performance indicator information.

2.2   Management Information System

The need to have accurate and comprehensive property information was recognised as one of the four key conclusions of the 2002 Best Value Review of Property, the report recommended –

> *'Implementation of a system of collating, maintaining and updating comprehensive property information, to include full details of the current estate (asset register), suitability, utilisation and running costs. This will assist in future benchmarking and ensure that officer and Member property related decision making is based on information and benchmarked with comparable activity'.*

<div align="right">*Executive Summary – Best Value Review of Property 2002 Final Report*</div>

The final report and subsequent Improvement Plan, which contained specific actions related to the above recommendation was presented and agreed by the Council's Executive in October 2002. Both the Lead Member for the BV Review and the Lead Member for Property are involved in monitoring the delivery of the Improvement Plan.

There has also been considerable progress since the 2002 AMP, when it was reported that the Corporate Property Team was negotiating the purchase of the 'Evolution' asset management information system, which would replace the series of spreadsheets and provide a powerful tool to assist property decision-making.

The system was purchased in late 2002 and the 'Evolution' system has been successfully installed within the Corporate Property Team who now have responsibility for the systems administration and development of the system. A post of 'Data Management & Property Information Officer' has been created within the revised structure of the Corporate Property Team. Additional funding to support the inputting of data onto the system was secured via a report to the Corporate Asset Forum in March 2003 and this process is underway.

Work is also progressing on 'smartzoning' CAD drawings of Barking and Dagenham's operational estate onto the 'Evolution' system and a pilot started in May 2003 aims to have systems based 'drawings', into which condition survey information can be assigned (down to room level) for the first batch of buildings by the end of Summer 2003. The Project Manager responsible for this is liaising with both the software designers and the Council's Education Team who undertook a similar exercise for its Education AMP. The Evolution system also has the ability to link to the Council's 'Oracle' financial information system to ensure full integration.

having identified the data required by each Department on their own assets, the role of the 'data capture' group referred to in the 2002 AMP, has now been incorporated into the work of the Asst Utilisation Group to ensure better co-ordination.

2.3   Property Information and Data Capture

Besides the core property data, much of the information in respect to suitability and fit-for-purpose is undertaken via the Service Asset Management Plans (SAMP - see section 5.1.6), this enable service heads to evaluate the suitability and sufficiency of its buildings that deliver services are, and what options should be considered in order for improvements to be made. As the quality of this information may determine areas for capital spend, the process of completing this information can be detailed and complex. The Corporate Property Team have therefore undertaken to assist Heads of Service heads in completing this information by providing the centrally held core data and advice, support and option analysis in delivering property solutions. This approach has been particularly successfully within the Social Services Department since September 2002, which has enabled Social Services to produce capital bids in excess of £13m over 5 years to target improvements within its operational estate (see section 5.1 for more detailed information).

The Corporate Property Team and members of AUG (see section 1.7) continues to work with asset managers within each of the Service Departments in order to share building information and ensure that any data collected and recorded within other systems held elsewhere within the Council, such as the asbestos register, building maintenance term contract database, DDA survey work etc link with the 'Evolution' system. Until formal electronic links can be established with these systems, information will be entered manually on the 'Evolution' system, which will thus become the central database for all property related information.

2.4   Updating Data, Developing Improvements & Training

The Corporate Property Team recognises that no system can be successfully implemented without a clear strategy for data development, use of management information and reports and staff trained in the functionality of the system. The Asset Utilisation Group is also helping

to specify and collect the more detailed information of the Council's portfolio for inputting onto the 'Evolution' system.

An audit of training requirements was completed in January 2003 and following on from basic overview training, two officers from the Corporate Property Team undertook a five-day training course in the 'Evolution' system in March 2003. Cascade training is currently being undertaken and further training dates have been booked for 2003.

As information is transferred to the 'Evolution' system, both standard and specialised management reports will be produced and work to identify the type and format of reports required will form an agenda item for August and September AUG meetings.

Section 3 – Consultation

3.1 How We Consult

The Council is fully aware that consultation is one of the fundamental principals of the Best Value framework, the Governments modernising agenda and Barking and Dagenham have improved its techniques and attitudes to consulting stakeholders over the past few years and are determined to continue this process.

Working towards improving the strategic approach to consultation, a consultation strategy and toolkit was produced in 2002, which detailed the context within which all Council's consultation should take place along with a framework for improving consultation.

The Council has an established Citizen's Panel of 1,000 residents who form a cross section of the local community. A market research company manages the panel independently of the Council. The panel also acts as a useful resource for all consultation work, which has a variety of forms; postal questionnaires, interviews and focus groups. Some of the projects the panel have been involved in over the past year includes, people's views on hostels for homeless people and what local people thought of new plans for improving Barking Town Centre.

3.2 Continuous Improvement Through Consultation

The 2002 AMP outlined the range of consultation that had been undertaken with stakeholders, as part of the Best Value Review of Property. Significant progress has been made in 2003 in developing the results of the consultation, reacting to the findings and affecting real change for the stakeholders concerned.

The following table builds on the work described in the 2002 AMP and evidences the progress made –

Stakeholder Group	How Were they Consulted	Progress made / Improvements introduced as a Result of the Consultation
The Public	via the Customer First BV Review.	- Appointment of an interim Head of Service and project team. - Major refurbishments and improvements to the public areas of the Civic Centre and Town hall. - Integration of cashiers and car parking payment points. - Consolidating close proximity reception

Stakeholder Group	How Were they Consulted	Progress made / Improvements introduced as a Result of the Consultation
		counters.
The Corporate Body (TMT & Service Mgrs)	Individual interviews and challenge sessions.	• Clarity around reporting structures. • Greater profile for asset management. • Programme for communicating the asset management role. • Asset management checklist within BV Toolkit.
The Property Staff	Individual interviews and group sessions.	• New structure for the Corporate Property Team. • A revised property services strategy. • Clarity around roles and greater integration with other asset management related teams.
Commercial Tenants	Tenants questionnaire	• A number of individual problems and lease concerns have been addressed. • One tenant renewed their lease as a direct result of this new approach. • A revised 'Tenants Guide to Leasing Commercial Property' which is a booklet for prospective tenants outlining all aspects of taking on a commercial lease. This has been forwarded to the Plain English Council for a Crystal Mark. • Service roads have being 'gated' to reduce flytipping and abandoned cars.
All Council Staff	Office accommodation related questionnaire.	• A team in one of the 'worst' performing buildings (based on the results of the questionnaire) has since been relocated to a more appropriate building. • Further property reviews built into the BV Improvement Plan. • Some building concerns highlighted have been addressed within the annual major maintenance programme.

In addition to the above, 2002 saw the Council's first comprehensive Staff Survey '*Your Job…..Your View',* organised and distributed by the Council's corporate HR Team. The survey was attached to the salary slip of every staff member. The results were communicated at one of the quarterly Senior Management Briefings and Departmental Directors have been given specific improvements to deliver, under an agreed action plan

Other examples of where consultation is leading to service improvements include –

• Changes made within the re-tendered 2003 Commercial Estate Management Contract includes regular tenant consultation.
• Customer satisfaction surveys undertaken by the Asset Management and Development Division, related to design and property projects.
• Post project reviews of capital and major schemes.
• Collection ethnicity information on our commercial tenants in order to provide information in other languages.
• Reorganised Community Development Teams to assist improved co-ordination with Community Associations.
• Improved opening hours for Libraries following a Best Value Review.

- Improvements to staff working environments.

3.3   Consultation with Service Heads

The Service Asset Management Plans (SAMPS) are the main vehicles for consultation with Service Heads and a section of the form relates specifically to the suitability of operational properties from where services are delivered. Details of the SAMP process are outlined within Section 5.1.6.

3.4   The Future of Consultation

The Council will continue to share information about surveys undertaken in the Borough, developing a co-ordinated approach to avoid consultation overload, share best practice and to actively involve residents from hard-to-reach groups. In addition, Barking and Dagenham are part of a London wide consultation network where officers from different Councils can share ideas and develop good practice.

Best Value reviews of Council services will continue to generate consultation work to assess stakeholders' views of the quality of services and how they can be improved, whilst the Asset Management Division, is itself committed to play its own part in this process. The development of an ongoing consultation cycle forms part of the Property Best Value Improvement Plan, the continued development of post project reviews, customer satisfaction surveys and the work of the Asset Utilisation Group will ensure that the Council continues to provide good quality buildings and environments based on the needs of its service users and staff.

Section 4 - Performance Management, Monitoring & Information

4.1   Continuous Improvement Through Managing and Monitoring Performance

The Councils knows and understands the importance on being focussed on the big picture. To achieve this, it uses the Balanced Scorecard (BSC) System to manage the Council, ensuring that all actions it takes are in pursuit of a common goal. Barking and Dagenham were the first authority to use this system across the whole Council which translates the objectives of the Council down to individual services.

The Council's '2020 Vision' document sits at the top of the performance management framework and establishes a vision for the Borough working towards the year 2020. Below the Vision are the Council's seven Community Priorities (outlined in the Core Data) that help deliver the vision.

Under these priorities sits the Community Strategy to which the Council and the organisations that work with the Council are signed up to, through the Local Strategic Partnership. The Community Strategy sets out targets for 2006-2010 and 2010-2020 which is delivered and monitored through multi-agency steering groups assigned to each of the community priorities.

In addition, the Council has a Balanced Scorecard Strategy Map consisting of 17 key priorities, developed from the seven community priorities and these are reviewed annually. The scorecard presents a more balanced view of performance because it considers its

customers, staff, finances and processes all of which are important in delivering improvements and is monitored jointly by Members and Officers.

By using the Balanced Scorecard, the Council can demonstrate how its priorities and actions will help deliver the Community Strategy. The Best Value Performance Plan (BVPP) is the overall strategy for the Council.

Departmental performance is measured via the individual Service Scorecards and ensures all the individual service actions of the Council are in line with delivering against the Council Scorecard. The Service Scorecard is part of a 'Scorecard Pack, for each Head of Service, comprising a strategy statement setting out the medium to long term vision for that service, a strategy map which sets out service objectives and PI's to measure these against, an implementation plan setting out specific action that needs to be taken (incorporating any CPA or BV review improvements and stakeholder consultation) and a set of Performance Indicators (statutory and local). Individual Service Scorecards are also used to measure the performance of Heads of Service who in turn monitor and develop their own staff through the Council's appraisal system.

There is therefore a clear line of sight between the overall vision for the Borough, targets set for the Council's contribution to this, through to Departmental and Service Scorecards onto team and individual performance.

The Corporate Property Team measures it's own performance via the Asset Management & Development Service Scorecard, which has twelve objectives spread across the services it delivers. Many of the objectives take into account what our stakeholders have asked us to address. For instance, the objective to '*Further develop partnerships with customers and other stakeholders to improve communications and promote learning from each other*' was in response to our stakeholders requesting information on the responsibilities of the new Division. Whilst the objective to, '*Develop practices that support team building and promote cross divisional working*' resulted from staff feedback and the desire for a more corporate approach to asset management.

The scorecard is monitored monthly by the Heads of Services to ensure monitor that targets and objectives are being met and ensures that performance measures are fed into the process of continuous improvement. This information is fed back to the Departmental Management Teams, Corporate Strategy Department who collate and comment on this information and reviewed by the Chief Executive.

Additionally, the Scorecard process is being developed to enable greater use to be made of synergies within the authority and to identify areas where objectives can be supported in more crosscutting ways.

A consistent approach to the BSC is further supported by the production of a 'pack'', which was developed in 2002 for all 2003/04 Service Scorecards. The pack includes an asset management & property checklist, which asks all service heads to consider asset management and property issues when considering its own Service Scorecard objectives.

4.2   Comparing and Reporting Performance

The Corporate Property Team was instrumental in June 2002 in creating a local benchmarking group aimed at comparing National Property Performance Indicators and establishing a consistent approach in the development of local performance indicators.

The East London Corporate AMP Group, now comprises Barking and Dagenham, Redbridge, Waltham Forest, Newham, Hackney & Tower Hamlets Councils.

During the last year the forum has focussed on the following core issues:

- Sharing Data and comparison of performance against national pPI's.
- Investigating how member Council's produce their national pPI information
- Development of local pPI's
- Developing Best Practice amongst its members

The forum has provided a valuable opportunity for information exchange. In addition to the interpretation of Asset Management Planning Guidance and production of the National pPIs issues covered have included property information systems, accommodation space Standards and DDA issues.

This more localised focus has been a useful complement to the National IPF Asset Management Workshops, as it has allowed comparison of approach and performance between Authorities. The Group has also looked at why differences in pPI data may occur and where this is valid due to the circumstances of an individual authority.

Local Performance Indicators have also been developed within the Asset Management and Development Service Scorecard pack and in relation to both the land disposal programme and the performance of the commercial investment portfolio.

The Corporate Property Team, as members of ACES (Association of Chief Estate Surveyors), also submit annual performance information through the London ACES Benchmarking Group. This information is useful in comparing performance against other London Boroughs with similar sized portfolios.

Section 5 – Programme and Plan Development and Implementation

5.1   Programmes Delivering Asset Management

The Council have a range of programmes designed to deliver the required property and asset management related requirements and improvements identified in the processes contained within the previous sections of this plan. This section describes these and demonstrates how the Council's overall asset management process, that underpins its AMP, is helping to support, develop and deliver the Council's overall asset management strategy.

5.1.1 Delivering 'Customer First'

Initiated via the work of a Year Two Best Value Review, Customer First is the Council's major initiative in improving and streamlining the way the Council interfaces with the community and the manner in which services are accessed. The review also looked to set out an agreed plan for the Council to meet E-Government targets.

Considerable consultation was undertaken to determine how the community contact and access services and what improvements. An appointment has been made to the post of Head of Customer First and an 'intelligent client team', with external facilitation has been created. This project will have a significant impact on the Council's assets as it redefines where services should be located,

Major refurbishment work has already started to improve public access, reception and waiting areas in both the Council's Civic Centre and Town Hall buildings.

An outline business plan, due in Autumn 2003 will how customer contact services can offer Borough wide coverage, acceptable to local people, an option appraisal of possible contact centre arrangements, improved web based access and information and improved intranet services for staff and one-stop services based on public consultation. This will include a review of the premises required and look at existing centres used by the Council and other opportunities with partner agencies such as aid and advice centres.

In addition, the Council is considering how to maximise the benefits for improving access to services through other current initiatives, such as the development of Community Housing Partnership offices (new local housing offices) and the health and social care improvements, being delivered through the LIFT schemes.

5.1.2 Identifying Surplus Property, Disposals and Acquisitions

There are several mechanisms in place that identify surplus property assets –

- Highlighted via the SAMP process (see section 5.1.6)
- Property changes that result from Service Scorecard objectives and activities.
- Via the Asset Utilisation Group (see section 1.7)

In addition, the Corporate Property Team have recently set up with the Council's Housing Department, a system for identifying surplus or under-utilised land on Council estates. Using the local knowledge of Estate Officers and other staff members who 'walk the patch', plots and sites are identified back to the Corporate Property Team who undertake title checks (via the Land Terrier) and investigate any covenant/planning issues, before discussing these with the Head of Landlord Services on a bi-monthly basis. This critical analysis of the Council's housing estates will enable additional disposal opportunities to be identified funding and contribute to the raising the decency standards of the Council's stock.

In 2002, the Council successfully acquired, at auction, a block of partially vacant retail units, in the area of Barking Town Centre, on behalf of the Housing Department in order to realise a larger redevelopment opportunity.

Details of the Barking and Dagenham's extensive four-year land disposal programme is contained the Core Data Section.

5.1.3 Under Performing Assets

The Council has over 370 properties within its commercial investment portfolio, the majority of which are tertiary shopping parades, generating an annual income of approximately £2.5M.

Since the 2002 a 'parade' analysis' exercise has been completed on each shopping parade to ensure it conforms to the three reasons for owning investment properties contained with the Council' Estate Management Policy –

1. Income generation / investment reason – e.g. each parade provides the Council with an internal rate of return in keeping with the targets set.
2. Social / community reasons – e.g. local shops in isolated communities or social facilities let to the community.

3. Strategic property / regeneration reasons – e.g. properties acquired to enable a larger redevelopment scheme.

The parade analysis also takes into account the history of the parade, repair issues, opportunities to increase income, investment potential .

Parades that have performed badly and don't meet the Policy, inform the land disposals list for either market or auction disposal.

5.1.4 Capital Programme and Prioritisation

The Council has a well develop and extensive five year capital programme (see Core Data section), set to deliver improvements in excess of £400m.

Bids for capital schemes are currently submitted using the Capital Project pro-forma (see Appendix 5) and prioritised and assessed by the Capital Investment Panel (see section 1.8), alongside the capital available (from areas such as right-to-buy sales, land disposals, use of reserves and external funding), the Council's community priorities, objectives and scorecard targets.

Details of the comprehensive review undertaken and the role of the Capital Programme Management Office (CPMO) is outlined in section 1.8

It is intended that the CPMO will facilitate the clarification between the sponsorship and delivery roles, encourage best practice, facilitate the adoption of consistent and processes, management information and reporting mechanisms and encourage the ownership of all stages of the project lifecycle. The CPMO will also ensure a focus on the real issues and encourage effective governance of the capital programme.

The CPMO have progressed on a number of fronts with regard to putting in place a range of mitigating actions –

- Improved sponsorship.
- Scheme approval framework from inception to inclusion on the capital programme, including a guidance document. Schemes will need to link with the departmental SAMP process (see section 5.1.6)
- New project appraisal process – introducing greater challenge, improving upon risk management, targeted and measurable outcomes, option analysis and project review, all to be included within the above guidance document.
- Improved delivery – based on a matrix management approach using external partners.

5.1.5 Supporting Departments in Delivering Asset Management

As part of the integration between the Social Services Department and the Barking and Dagenham Primary Care Trust and in order to improve both the fit-for-purpose of the existing estate and produce a joint asset management and property strategy, a member of the Council's corporate Property Team has been provided strategic and operational asset management support on a part-time basis.

This has proved extremely beneficial in delivering both short term improvements in office accommodation and service delivery buildings and providing a medium to long term strategy within both a corporate and departmental environment.

Using the information held both centrally and within service areas, Service Asset Management Plans (see section 5.1.6 on SAMP's) were completed for each of the service areas, this bought together building information with service information and consultation findings, undertaken as part of year one and two Social Services related BV Reviews. This clarity around service needs and the gaps that existed within the current estate, was interpreted into a number of bids to the Council's capital programme, covering 5 years of expenditure totalling over £13M.

As these capital schemes progress, additional work with individual service managers was undertaken to ensure an inclusive and co-ordinated process and some initial deliverables have seen a care management team move into more suitable accommodation, another team relocated to shared accommodation with the Education Department and the refurbishment of reception areas. A further four projects are under developments for 2003/04 implementation. Links have also been established with the LIFT programme and the assets held by the PCT. Lift (see section 5.1.8) will see a number of shared health and social care facilities developed cover the next few years, all of which are contained within the LIFT 'Strategic Services and Development Plan'. A draft joint Social Services / PCT asset management strategy is being prepared and is expected to be ready in August 2003.

By developing this close association between the Corporate Property Team and the Social Service Department, the knowledge and experience within a specialised service area, has been supplemented by expertise and the corporate view of Property Team in jointly delivering creative and sustainable asset management solutions.

5.1.6 The SAMP Process - Identifying Property Gaps and Appraising the Options

In order to identify departmental property plans and proposals, Service Asset Management Plans (SAMP's) were introduced in 2002 and were updated in 2003. The revised 2003 SAMP form consists of six stages (outlined below) designed to guide service heads through the process of identifying and documenting current and future use of their property assets. This information on suitability, sufficiency and options for future property delivery, is then collated through the Corporate Property Team. A condensed version of the SAMP form is shown in Appendix 7.

- **Stage One** – Confirms the list of properties managed within each of the service areas as well as basic property and address data. This also helps the Corporate Team keep the Asset Register up-to-date.
- **Stage Two** - Highlights the implications for property resulting from Service Scorecard objectives and other policy guidance. it also asks Service Heads to consider the property impact of corporate initiatives.
- **Stage Three** – This stage details utilisation and occupancy levels of the Council's main shared use administrative buildings and its suitability for service delivery . By using staff numbers and GIA's , space standards of each building can be calculated.
- **Stage Four** – Details cost, condition and performance indicator information. This information is used to calculate the National Performance Indicators.
- **Stage Five** – Service heads are required to 'score'; each existing property against fit-for-purpose headings (such as floor space, suitability, access issues, IT compatible etc).
- **Stage Six** – Summarises the assessment of the existing stock, properties likely to be surplus to requirements, future property need and sets out a short, medium and long term plan for both the existing properties and options for future service based need.

5.1.7 A Corporate Approach to Accommodation

Section 5.1.1 has already outlined how the Customer First initiate will fundamentally change the way the Council interfaces with its users. The Council also understands that corporate thinking and problem solving, with officers working across Departments within multi-disciplinary group (see sections 1.5, 1.7 and 1.8) is the best way to affect the changes that have been required to drive and communicate property and asset management planning. However, this is not the only driver behind improving the Council's use of space and maximising the way property assets are developed.

The Council commissioned an accommodation strategy report in August 2001 (reported in the 2002 AMP), which sought to identify and discuss in broad terms, options relating to the optimal future course of action for 11 of the councils main operational and administrative buildings. The data contained within the report, which was undertaken by external consultants, has been used to set base data and standards against some of the best (and worst) utilised and performing properties. A project to update this data started in May 2003 carried out by a member of the Corporate Property Team.

SAMP's have been used to assist with and inform the development of property and accommodation strategies which reflect the medium to long term vision of how services will be provided and the points of delivery. These strategies will be continually reviewed as service departments review their future requirements e.g. – Social Services / PCT strategy and the property implications of the Customer First review.

It is expected that the implementation of these strategies will not only reduce the number of operational buildings and the requirement for space required but will also produce an improved working environment which will be conducive to and support improvements in service delivery.

In determining revised space standards and better utilisation, officers from the Council's Asset Management & Development Division and Asset Utilisation Group visited the London Borough of Ealing, who recently won the RICS award for organisational management in the way it has delivered improved space utilisation (up to 40% in some areas), within one of its main operational buildings. The knowledge gained from the process as well as the outcome is being carefully studied to see if similar techniques can be used to improve space utilisation within Barking and Dagenham and a number of pilot areas are already being planned.

Alongside this, officers within the Corporate Property Team are working with other authorities in the Local Government Forum, being co-ordinated by Sheffield Hallem University, on three projects which cover maintenance costs, suitability and sufficiency of corporate buildings and facilities management which reviews both the costs incurred and the delivery of services.

The three projects together with the six annual workshops will support and influence the future development of property and accommodation strategies within Barking and Dagenham.

5.1.8 Improving Health and Social Care Through LIFT

As mentioned in sections and 1.14 and 5.1.5 major improvements to health and social care facilities are being made through the NHS Local Improvement Finance Trust (LIFT). A number of schemes are already in the programme for 2003/04 which will see a number of new and refurbished health centres and the construction of joint health (Primary Care Trust) and social care (Social Services Dept) properties for the integrated service, all of which are set out in the 'LIFT Strategic Services Development Plan' published in 2002. The Council's Housing Department is also undertaking a joint scheme linking a Community Houisng Office with localised healthcare provision in Barking. The Corporate Property Team is working closely with the LIFT Project Director to ensure the Council plays a pro-active and supportive role in delivering these schemes, on both Council and PCT owned sites.

5.2 Further Improvements - Future Asset Management Developments

In addition to the pilot schemes and projects mentioned within the preceding sections, 2003/04 will also see additional progress in areas such as facilities management, the development of arrange of asset management and property guidance notes 'The Asset Management Handbook' reviewing and building on the gap analysis work already undertaken will be developing a 3-5 year strategic asset management and property plan alongside the customer first project, all of which, are designed to take the asset management agenda further forward within Barking and Dagenham.

Barking and Dagenham is committed to continuous improvement of not just its services to the public, but in the way it delivers services to its staff. This years AMP demonstrates that commitment and provides conclusive evidence of the range of innovative and creative solutions being tried and developed within a corporate environment, whilst at the same time still appreciating the fundamental benefits of having accurate and up-to-date property information that supports not only, decision making, but the views of its stakeholders in delivering further improvements to the service.

Primary & Secondary Requirements   APPENDIX 1

Primary Requirements	Where main evidence can be found
Organisational Arrangements for Corporate Asset Management	
P1 A Corporate Property Officer (CPO) has been identified with authority to undertake all required developments in asset management	*Section 1.6*
P2 Roles and responsibilities for CPO (as indicated by the prevailing guidance) are clearly set out, explicit and have been communicated to all those concerned, in property management and use, throughout the authority.	*Sections 1.13 & 1.6*
P3 The CPO reports and is accountable to a strategic, decision-making group both at officer and Member level.	*Section 1.5, 1.6 & Appendix 2*
P4 Clear evidence has been provided that a cross-service, senior management forum has been set up which includes the CPO and representatives from major services and where appropriate, the finance directorate and officers involved in the development of the Capital Strategy and the Community Plan (or it's equivalent)	*Sections 1.4,1.5, 1.7 & Appendix 2*
P5 The forum has formal terms of reference that includes the strategic management of the Council's assets.	*Section 1.5 & Appendix 3*

P6 Evidence that the Forum :
   •   Progresses the corporate Asset Management Plan and ensures that it is approved by senior officers and the Council.
   •   Ensures that the AMP is informed by and supports other key corporate and service plans and objectives.
   •   Meets regularly (at least twice a year or more often as may be appropriate)
	Sections 1.4, 1.5, 1.14 & 1.15

Data Management	
P7 CPO has ensured that a record is held of basic, core data on all the Council's property	*Section 2.1*
P8 The validity of this information has been tested	*Section 2.1*
P9 AMP can demonstrate a clear understanding of the data required to manage the performance of the property portfolio.	*Section 2.1 & 2.3*
P10 Statistical information on the overall condition of the portfolio (condition categories A-D/1-3 and maintenance backlogs is included in the AMP.	*PPI's*
Performance Management, Monitoring & Information	
P11 CPO has submitted a report to Members and Chief Officers at least annually on the performance of the property portfolio, which now includes performance outcomes in relation to the ODPM National pPI's.	*Section 1.3*
P12 The AMP includes information showing how the authority is performing in relation to all five national PI's	*PPI's*
P13 Members are informed, as part of the overall budget and performance monitoring, of the progress and performance of the Capital Programme.	*Section 1.3 & 5.1.4*
Programme and Plan Development and Implementation	
P14 The AMP outlines the Council's property related requirements and outlines the proposed programmes which are intended to meet these requirements *(eg- acquisitions, disposals, investment development, maintenance, programmes related to surplus and/or under-performing assets, plans enabling shared use and/or locations.*	*Section 1.14, 5.1.1, 5.1.2, 5.1.3 & 5.1.8*
P15 CPO has demonstrated that there is a methodology for option appraisal and corporate prioritising between projects.	*Section 1.8, 5.1.4 & Appendix 5*
P16 A 3-year capital programme is developed including a forecast of the planned capital receipts	*Core Data*
P17 Output/outcome targets are set for programmes and plans requiring capital investment.	*Section 1.8, 4.1, 5.1.4 & 5.1.6*

Secondary Criteria	Where Main evidence can be found
Organisational Arrangements for Corporate Asset Management	
S1. Evidence that the CPO / Asset Management Forum routinely challenges and reviews the use, provision and performance of the Council's assets and its related property services, in order to achieve the most effective management, planning and use of these assets. Key findings and outcomes are reported to Chief Officers • The identification and rationalisation of surplus or under-performing property • The promotion of shared use or co-location • The systematic review and challenge of property use, provision and management and • Identification of the property implications arising from relevant plans, audits and reviews	*Section 1.14, 5.1.1, 5.1.5, 5.1.6 & 5.1.7*
S2. Evidence that the CPO / Asset Management Forum takes into account stakeholder satisfaction information relating to property and property services.	*Sections 1.12 & 3.2*
S3. A cabinet member (or lead committee member) holds responsibilities for the authority's property resource on behalf of the Council.	*Section 1.3 & 1.9*
S4. The CPO is involved in the preparation of the Capital Strategy and contributes to the work of other relevant corporate and business planning groups.	*Section 1.6*
S5. There are references to the property asset implications in corporate policies and strategies such as the Best Value Performance Plan, Best Value Reviews, the Capital Strategy, the Community Plan and LPSAs.	*Section 1.15 & 5.1.1, 5.1.5*
S6. There is evidence of cross service use, shared use and/or co-location of property resources within the authority and with other organisations.	*Section 1.14, 5.1.1, 5.1.5 & 5.1.8*
Consultation	
S7. Evidence that processes are being developed to obtain feedback from services, users and occupiers.	*Sections 3.1 & 3.3*
S8. Evidence that consultation findings are used to influence the continuous improvement of property and property services performance.	*Sections 1.12, 3.2 & 3.4*
Data Management	
S9. CPO has undertaken a full survey of future data requirements for the property portfolio.	*Section 2.1*
S10. CPO has identified a programme of necessary improvements.	*Section 2.4*
S11. CPO has commenced development of a data system for "intermediate data (i.e. property data which requires updating from time to time such as condition, rents and user details).	*Section 2.4*
S12. CPO has implemented Unique Property Reference number (UPRN) system or set out detailed reasons why any alternative property referencing approach is considered more appropriate.	*Section 2.1*
S13. CPO has developed an approach for the centralised co-operation of property management information and its integration with relevant Council financial information.	*Section 2.2*
S14. CPO has undertaken a review of training needs for users of the data and set in place a system for satisfying those needs.	*Section 2.4*
Performance Management, Monitoring & Information	
S15. Clear evidence that the CPO is developing and using a set of local performance measures in relation to assets that link asset use to corporate objectives.	*Section 4.1 & PPI's*
S16. Clear evidence that the CPO is developing a process to enable the comparison of the performance and competitiveness of property and property services with other similar organisations and other providers.	*Section 4.2*
S17. Clear evidence that the development of performance measures and monitoring takes into account stakeholder consultation and user satisfaction findings.	*Section 3.2 & 4.1*
S18. Clear evidence that performance feeds into a process of continuous improvement.	*Section 3.2 & 4.1*

Secondary Criteria	Where Main evidence can be found
S19. Local Performance Indicators are in place and are being used for measuring and monitoring the amount of surplus property and space utilisation	*Section 4.3 & PPI's*
S20. A written report is produced for Members and Chief Officers on any maintenance backlog recommending appropriate action.	*Section 1.3*
S21. The CPO is collecting information on the "suitability" of the various categories of the portfolio for their current and future use.	*Section 2.3, 5.1.5 & 5.1.6*
Programme and Plan Development and Implementation	
S22. The AMP demonstrates that the Council has identified the implications for property, which arise from the Council's objectives.	*Sections 4.1, 5.1.4 5.1.5 & 5.1.6*
S23. The AMP demonstrates service wide understanding of Corporate ownership of assets.	*Sections 5.1.5 & 5.1.7*
S24. The AMP demonstrates that the Council has undertaken a thorough investigation and analysis of the gaps between future requirements and the current provision and performance of the authority's present property assets.	*Section 5.1.6*
S25. The Council has identified and appraised the options for closing these gaps.	*Section 5.1.5 & 5.1.6*
S26. The AMP outlines the Council's approved 3-5 year strategic action plan based on this analysis.	*Section 5.3*

This page is intentionally left blank

Framework for Corporate Property Asset Management 2003

Scrutiny Role

The Executive

Corporate Asset Forum (CAF) *(Members of TMT)*

Corporate Finance

Corporate Asset Management (CAM) Group

Resource Monitoring Group (delivery of capital schemes)

Capital Investment Panel (CIP) (capital scheme challenge & approval)

Asset Utilisation Group (AUG) (space standards, use and accommodation)

Strategic Direction Council's 20/20 Vision

The Council's Scorecard

Capital Strategy

Director of Leisure & Environmental Services

Head of Asset Management & Development Division (Corporate Property Officer – CPO)

☐ Corporate Estate & Property Services
☐ Design Services
☐ Facilities Management
☐ Capital Programme Management Office

Departmental Management Teams *(Property Clients)*

- Housing & Health
- Social Services
- Education, Arts & Libraries
- Leisure & Environmental Services

Corporate Asset Management Plan (AMP)
All operational & investment properties

- Service Scorecards
- Dept Business Plans & Strategies
- Service Asset Management Plans (SAMP's)
- Education Asset Management Plan (EAMP)
- Asset related corporate initiatives

Page 33

This page is intentionally left blank

CAPITAL ASSET FORUM (CAF)

TERMS OF REFERENCE

The Forum's role is that of a steering group charged with the review of all land and property holdings of the Council. This review will ensure that these assets offer the most appropriate means of providing efficient and effective services. The function will be undertaken through the receipt of reports and proposals for consideration from The Asset Utilisation Group (AUG).

In pursuit of this objective the Forum will:

1.   Agree a timetable for the delivery and continual review of the Asset Management Plan.
2.   Ensure that sufficient resources, both human and financial, are made available to deliver and review the plan.
3.   Agree on the Council's behalf the underlying policies and principles which will govern the development of the Asset Management Plan.
4.   Ensure that the asset management planning process has due regard to, and is consistent with, the Best Value process, the Community Plan and all other Council strategies.
5.   Provide guidance and expertise to departments on the delivery of their Service Asset Management Plans.
6.   To receive reports on the Capital Programme review process to ensure that all capital projects are consistent with the Asset Management Plan and that a formal process for post implementation review is in place.
7.   To report to the Executive against criteria for the measurement of performance of property.
8.   To receive reports from AUG to ensure that all property held by the Council is required for operational, or other purposes agreed by the Council from time to time.
9.   Agree the principal of sale, acquisition and/or refurbishment of assets as appropriate. To agree changes of responsibility for designated property between Departments on recommendation of AUG.
10.   Agree the use of incentives which will encourage Departments to release assets which are surplus to requirements.
11.   To hold the Asset Management Fund to be established which will hold all assets declared surplus to requirements and meet all revenue and capital costs relating to those assets pending appropriation or disposal of those properties.
12.   To report to Executive twice yearly on the progress against the workplan for the Forum.

This page is intentionally left blank

<div align="right">**APPENDIX 4**</div>

Service Scorecard Checklist

Asset Management and Property

Questions to ask when preparing service scorecards, related to asset management and property –

1. How much information do you know about the costs associated with the buildings you **currently** deliver services from ?

2. Has any research been undertaken as to where your service should be located and how it is accessed by the public ?

3. What steps are you taking to ensure asset management planning is included in your service planning ?

4. Are your service properties suitable for their intended purpose (ie – in the right location and of sufficient size etc) ?

5. Have you considered what information you require in order to make informed decisions around the future of your property ?

6. Have you included your property proposals in your Service Asset Management Planning (SAMP) Form* ?

7. Has consideration been given to sharing properties within either the same Department, or a different department or agency ?

8. Is the space your service currently occupies fully utilised, or could it be used more effectively ?

9. Have you considered any other property related initiatives that are happening around the Council ?

10. Have you enough property with which to deliver the **future** plans of the service ?

11. Have you considered how your service will pay for the initial and on-going costs of any property changes.

<div align="center">~~~~~~~~~~~~~~~~</div>

The Council's Corporate Estate & Property Service can provide the following services –

- Property advice
- Leasing information and advice
- Utilisation advice
- Development support
- Valuation and estate management advice
- Asset management planning
- Property related management information

* SAMP forms can be obtained from and discussed with, the Corporate Estates & Property Services Team.

This page is intentionally left blank

APPENDIX 5

Project Title

Client Officer

Reference number (if allocated) ———————— Charge code (if allocated) ————————

FINANCIAL IMPLICATIONS

1. **Total estimated value of scheme (including fees)**   **£** ————————

2. **Total estimated value of fees (included above)**   **£** ————————

3. **Has estimate been confirmed by QS?**   **Y/N**
Comments_____

4. **Anticipated spend profile (actual spend not invoice date):**

2002/2003	£	2003/2004	£	2004/2005	£
Q1 (Apr-Jun)		Q1		Onwards	
Q2		Q2			
Q3		Q3			
Q4		Q4			

5. **How is scheme to be funded?**
(e.g. capital receipts, SRB, S106, private sector etc)

Year	Amount £	Source

6. **Ongoing revenue implications: cost/savings**

Amount £	Detail

PROJECT PLAN

7. **Anticipated start date**   **(mm/yy)**   **Anticipated completion date (mm/yy)**

Key milestones (e.g. feasibility study)	Date

8. **Brief description of scheme**
(Basic features, type and size of building/ development work; basic indications of furnishings, equipment requirements etc.)

9. **Detail of alternative options considered**

1

NEEDS ASSESSMENT

1. **Does the scheme meet the Council's strategic objectives, contributing to B&D 2020 vision?**

2. **Does it feature in your divisional Strategy document, AMP, Balanced Scorecard?**

3. **Are there legislative/legal requirements that may render the scheme unavoidable? (e.g. basic need for school places)**

4. **Will it produce revenue savings?**

5. **Are there any health and safety considerations?**

6. **Does it involve partnership working?**

7. **Does it meet a government initiative?**

8. **What is the effect if the scheme does not proceed?**

Office Accommodation Change

This form should be used to give advanced notice to the Council's Asset Utilisation Group of **any** proposed changes to the council's office accommodation and requests for **all** additional accommodation -

For   - Internal moves involving more than ? persons.
                    - All moves when staff are moving between buildings.

                    Please complete Section One of this form.

For   - Requests for Additional Accommodation (Section Two)

                    Please complete Section One of this form.

Please Return completed form to –   **Asset Utilisation Group**
                                         c/o Corporate Estates & Property Services Team,
                                         Barking Town Hall

_____

SECTION ONE – CHANGES TO EXISTING ACCOMMODATION

a) Current Position :	
Requested by (name & title) :	
Section / Team / Division :	
Department :	
No. of sites /addresses :	
Team to be relocated :	
Number of staff to be relocated :	
Where are the team currently located ? :	
Where do you propose to relocate them to ? :	
Public Access requirement :	Yes / No. (If yes, details)
Service User Access requirements :	Yes / No (If yes, details)

No. of staff undertaking flexible working : No. of regular home workers : No, of regular remote workers : No. of staff hot desking :	
b) Current Accommodation Problems :	
Fit For Purpose :	Yes / No. (If no complete below)
Space :	Detail :
Condition :	Detail :
Basic Facilities :	WC's, kitchens etc. :
Office Facilities :	Desks, meeting rooms etc.
ICT Facilities:	Telephones, computers, printers.
c) Current Management Problems :	
Accommodation for new staff :	
Facilities for new staff :	
Trade Union concerns :	
Health and Safety Issues :	
Other :	
d) Anticipated Future Problems :	
Space :	
Funding :	
Basic Facilities :	
e) Funding ::	
Do you have the funding to undertake the move (if yes, please give details)	

SECTION TWO – REQUESTS FOR NEW ACCOMMODATION	

Requested by :	
Section / Team :	
Department :	
Number of staff spaces required for :-	
Is public access required ?(if yes, please give details) -	
Please provide a brief description of your service -	
Do you have a preferred location ?	
Do you know how much space you require ? (if yes, please state)	
Brief Description of requirements – (ie – open plan, no of managers offices, meeting rooms, layout requirements, special needs	

KEY POINTS TO CONSIDER

Please consider the following points before making your request:

1. Please make sure you have an identified source of revenue to fund the relocation / move, by way of a budget code.

2. Ample Notice in the range of 4 – 6 weeks must be given in cases where I.T aspects are involved. This will allow the I.T section to plan their workload accordingly.

3. For new posts, accommodation requests should be made even before advertising the job.

4. The Asset Utilisation Group will evaluate your request to ascertain whether there are ways of reconfiguring your present location to allow space for more staff.

This page is intentionally left blank

Service Asset Management Plan 2003

LONDON BOROUGH OF BARKING AND DAGENHAM

SERVICE ASSET MANAGEMENT PLAN (SAMP) – PROPERTY STRATEGY

Department -		Service Area -	
Service Head -		Date Completed -	

Total Number of Properties -	

CONTENTS

Introduction to the Asset Management Process & Why Complete a SAMP ?
Stage One - List of Properties
Stage Two – Scorecard Objectives & Policies – Implications for Property
Stage Three – Shared Corporate Office Accommodation Occupied
Stage Four – Cost, Condition and Performance Indicators
Stage Five – Fit For Purpose of Existing Stock
Stage Six – Appraisal of Existing Stock & Assessment of Future Property Needs

Service Asset Management Plan 2003

Introduction to the Asset Management Process

Since 2001 all Council's have been required by the Office of Deputy Prime Ministers Office (ODPM formally DETR) to complete an Asset Management Plan (AMP). The AMP is designed to record information on the Council's property portfolio & asset register to ensure that all its property holdings –

- **Represent the minimum amount of suitable accommodation necessary for the delivery of the Council's services.**
- **Are capable of meeting the Council's corporate priorities and needs of the service for which it is being used to deliver.**
- **Informs the service and financial planning process by recording detailed management and running costs.**
- **Are being used to improve services in the future.**
- **Informs other Corporate processes such as the Capital Strategy, Capital Programme and major repairs programme etc.**

The AMP document is submitted to the Government Office for London (GOL) in July of every year and assessed as either poor, satisfactory or good.

The Council's 2001 AND 2002 AMP documents was both assessed as 'Satisfactory'

Why complete a SAMP?

The SAMP's will be used for **six** main purposes:

(1) Make informed decisions about capital and revenue expenditure and prioritisation.
(2) Plan ahead.
(3) Obtain higher levels of service from better managed properties.
(4) Optimise utilisation.
(5) Identify capital receipts to fund new property assets or improve other services.
(6) Identify innovative ways for meeting accommodation requirements.

STAGE ONE – LIST OF PROPERTIES

Guidance Notes

The table below sets out the buildings (according to the Asset Register) that your service area is the *sole occupier of or from where a service is delivered from.* Please check, amend or add as necessary and ensure all appropriate columns are completed. Do not include administrative office you share with other Departments, these should be included in Stage Four.

Property Name	Property Type	Address	Postcode	UPRN*	Comments

*UPRN = Unique Property Reference Number – To be supplied by Corporate Estates & Property Team.

STAGE TWO - SCORECARD OBJECTIVES & POLICIES - IMPLICATIONS FOR PROPERTY

Guidance Notes

The purpose of this stage is to consider how the balanced scorecard objectives are likely to affect the property requirements of each service area. This may be determined on a national, authority wide or individual service level.

The final tables asks you to consider property implications that are linked to other Departmental Policies and Corporate initiatives.

Property Related - Balanced Scorecard Objectives 2003/04

Service Objective	Property Implication	Timetable / Course of Action

Departmental Policies, which may affect Service Delivery in the future.

Internal Strategy / Policy Document / Proposed Legislation	Date of Strategy / Policy	Date of Anticipated Implementation	Likely Impact on Accommodation

Corporate Initiatives and the Impact on Property

Initiative	Property Implication for your Service	Timetable / Course of Action
Customer First		
Environmental Sustainability		
E - Government		

STAGE THREE – SHARED CORPORATE OFFICE ACCOMODATION OCCUPIED

Guidance Notes

The purpose of this table is to record and monitor the occupation of shared operational buildings such as Civic Centre etc. Please give details of where your staff are based. This section should _exclude_ any buildings described in Section One. Some information will be provided by the Corporate Estates Team (shaded columns).

Property Name	Floor	Division	Approx No of staff	GIA (Gross internal area) of area occupied M²	1-2 yr plan i.e. - do you intend keeping the Div located here?	Year this service will be BV reviewed	Which other Dept's share this building?	Any Additional Comments
Civic Centre								
Town Hall								
Ripple Rd Offices								

STAGE FOUR - COST, CONDITION AND PERFORMANCE INDICATOR EVALUATION

Guidance Notes

The purpose of this table is to record data in respect of the running costs of the properties you manage, repairs and maintenance issues and address the five National Performance Indicators now required.

Note – The 'Condition Assessment' is based upon asset surveys undertaken during 2002. The A-D categories (as defined by ODPM) which will be used in the condition survey are as follows –

A:	Good -	Performing as intended and operating efficiently.
B :	Satisfactory -	Performing as intended but exhibiting minor deterioration.
C:	Poor -	Exhibiting major defects and/or not operating as intended.
D:	Bad -	Life expired and/or serious risk of imminent failure.

The 'Priority Level' of repairs are as follows and should be used to inform your annual major maintenance bids -

Priority 1 – Urgent work that will prevent immediate closure of premises and/or address an immediate high risk to the health and safety of occupants and/or remedy a serious breach of legislation

Priority 2- Essential work required within 2 years that will prevent serious deterioration of the fabric or services; and/or address a medium risk to the health and safety of occupant, and/or remedy a less serious breach of legislation

Priority 3 – Desirable work required within 3 to 5 years that will prevent deterioration of the fabric or services; and/or address a low risk to the health and safety of occupants; and/or remedy a minor breach of legislation

Priority 4 – Long term work required outside the 5-year planning period that will prevent deterioration of the fabric or services

Property	Backlog of Repairs (£)				Total Backlog of Repairs (all 4 priorities)	Annual Property Management Costs per m² *	Revenue Running Costs		CO² emissions in tonnes of CO² per m²
	Priority 1	Priority 2	Priority 3	Priority 4			Business Rates	Energy Management Costs	

STAGE FIVE – FIT FOR PURPOSE OF EXISTING STOCK

Guidance Notes

The purpose of this stage is to identify the suitability and future requirement of the buildings that you currently deliver services from and your future requirements, linked to service needs.

The assessment should include consideration of the current suitability and the future suitability of the existing portfolio. A portfolio that adequately meets today's service requirements may well be unsuitable for the type of service that is projected to be provided in the future.

The Access Issues (DDA) box will be completed in conjunction with the Council's Access Officer.

FIT FOR PURPOSE OF EXISTING STOCK

Score: 1 = excellent 2 = satisfactory 3 = improvements required 4 = unsuitable

Property Name	Location of Site	Floor Space	Overall Size of Property	Internal Layout	H&S / Fire Compliant	Security	Environment / Image	Access Issues (DDA)	IT Compatible	Meets Need of Service	Overall Satisfaction	Approx Likely Lifespan

---

STAGE SIX – APPRAISAL OF EXISTING STOCK & ASSESSMENT OF FUTURE PROPERTY NEEDS

Guidance Notes

The purpose of Stage 6 is to be more specific about the future asset requirement and to begin to examine which parts of the portfolio are anticipated to be core to future service provision and where the case for continuing to hold assets in their current form is less persuasive.

FUTURE SERVICE DELIVERY & PROPERTY NEEDS

Short-term - Within the Next 12 -18 Months	**Medium Term** – Within the next 3 yrs	**Long Term** – Within the next 5 yrs or longer

Existing Property	Areas for Development	Time Scale (S / M / L Term)	Options for Meeting the Gap

Page 48