SURREY
COUNTY COUNCIL

Audit & Governance Committee
29 May 2014

Property Asset Management System Implementation Update

Purpose of the report:

The purpose of this report is to update the committee on progress with the joint Surrey CC and Hampshire CC implementation of the Manhattan Atrium Property Asset Management System (PAMS).

Recommendations:

1. That the Committee now recognises this project and the further development of the PAM System as part of Property Services business as usual delivery, therefore this will be the final report to come to this Committee.

Introduction:

2. This is a progress update on the PAMS system being implemented in Property Services. The PAMS system is a modular based system and several modules went live in April 2013.

3. The Committee received a progress report in December 2013 including this information plus a live demonstration of the system at the conclusion of their December meeting.

4. PAMS is an externally hosted web based system, called Atrium Property. The system was procured jointly with Hampshire County Council and is being implemented in collaboration with them.

5. The implementation of PAMS has been phased based on agreed priorities for both Surrey and Hampshire County Councils. It is a modular system that covers the full range of property management activities.

6. At the time of the last update to Committee in December, the project team were working on Phase 2 modules and supporting business as usual processes from the go-live in Phase 1B.

7. The phases and deliverables referred to in this report relate to the project implementation timeline included in the December 2013 report. It is attached to this report as Appendix A.

Progress Update

8. Overall progress on the project has been very good with Surrey County Council taking a lead in the roll out of the system. Hampshire County Council, although working jointly with us are still yet to achieve a go-live.

9. For information, other Councils including Kent, East Sussex, Brighton & Hove, Eastbourne and Reading have recently procured from the PAMS Framework contract, recognising its value, and are in the early stages of their implementations.

10. The interest and buy-in to the contract from other councils demonstrates the success of this venture and opens up opportunities for collaborative working in the future.

11. However, this success has led to a small overhead with Surrey and Hampshire, as lead partners, setting up a "Service Panel" to oversee and grant permissions for any changes to the system requested by other councils.

12. The following section details progress since the December 2013 report.

Progress Since December 2013 Report

13. Since the go-live of Property Master Data, Help Desk and Building Maintenance functionality there has been significant progress in the implementation of the remaining project deliverables.

14. The following table outlines progress since the last report.

Phase	Deliverable	Status
2	Programme management for construction projects and office moves.	Live from 1 April 2014.
2	Project management and procurement for construction projects.	Live from 1 April 2014.
2	Project management and procurement for major and minor office moves.	Live from 1 April 2014.
2	Resource Management – assigning staff resources to projects.	Live from 1 April 2014.
2	Property Portal - On-line access to property information.	Tested and ready for go-live to "Pilot" users (10 schools).
2	Request Portal – On line access to fault reporting.	Tested and ready for go-live to "Pilot" users (10 schools).

2	Education Sufficiency & Suitability (inc. Calculation of school net capacity assessments).	User acceptance tests complete and go-live scheduled.
2	Landlord/Tenant Management (Managing leases, service charges and other agreements – payable and receivable).	User acceptance tests complete and go live scheduled.
2	Recording of property acquisitions & disposals.	System developed and ready for go-live in mid-June 2014.
3	Storing of building manuals and other reference files.	Tested and ready for go-live with Property Portal (listed above)
3	Performance Monitoring and Benchmarking	Performance Monitoring enabled for Building Maintenance business area.
	Training Plan	In place and underway to cover training for all Property staff, selected service staff and contractors.
	GIS Integration with existing property data sets.	Live from April 2014.
	CAD floor plan integration (Interface for spatial data).	Future development planned.

15. The system is live and is now part of our business as usual delivery. We will continue to evolve the system over time and we have a number of in-house super-users who will drive this work and continue to embed the system. There have been time-delays from our original schedule, but this has not affected the budget. The learning points for the service in undertaking a major implementation such as this include:

   a) Allowing more time or more time-contingency to configure the system and prepare the data to transfer

   b) Ensure all resources - Project team, stakeholders and Supply-side are aware of the likely commitment on their time at the start, especially when a fast-paced implementation is required.

   c) Working in partnership has great advantages but some disadvantages in terms of the consultative decision making taking more time.

16. As well as the new deliverables outlined in the table above, there has been considerable progress in improving parts of the system that went live in April 2013.

   They include:

   a)   the adoption of the system by more external suppliers

   b)   the development of financial monitoring reports

   c)   the capture of more detailed information about our properties and associated plant and equipment

Conclusions:

17. Significant progress in the implementation of PAMS has been made. A Phase 2 go-live was achieved for programme and project management for construction projects and office moves, and the majority of remaining functionality is ready for go live in May 2014.

18. The parts of the system that are currently live represent the high volume and high value business areas in Property Services. Along with process reviews, this is helping us achieve leaner and more efficient ways of working.

19. The main foundation stones are now in place to develop the system to meet operational needs going forward. We have the right resources with the right skills to take this system forward.

20. Some issues have arisen that have delayed the implementation but these have been managed by the project board to minimise the overall effect on delivery timescales.

21. The full implementation of PAMS will deliver benefits that will improve customer service and help drive value from property assets. Benefits are already being achieved from the modules implemented so far.

Financial and value for money implications

22. There are no direct financial implications of this report. All financial implications of the PAMS project and any impact on the 2014/15 budget have been considered in the business case and are funded from the "invest to save" budget.

23. The project is on track with allocated budget of £90,000k. Spending is in line with the budget and not predicted to overspend. Current actual expenditure is £65,175.

Equalities and Diversity Implications

24. There are no direct equality implications.

Risk Management Implications

25. Risks on the project are managed by the IMT Project Manager, in conjunction with the Senior User in Property Services, and through project governance and are recorded in the project Risk Register.

Next steps:

26. Property Services will continue to develop the system as part of our business as usual delivery.

27. Staff and suppliers have been and will continue to be trained in the use of PAMS as defined in the training and project plans

28. Surrey and Hampshire County Councils will work with other interested local authorities that wish to buy from the contract and manage this through a newly formed Service Panel to ensure activities are coordinated.

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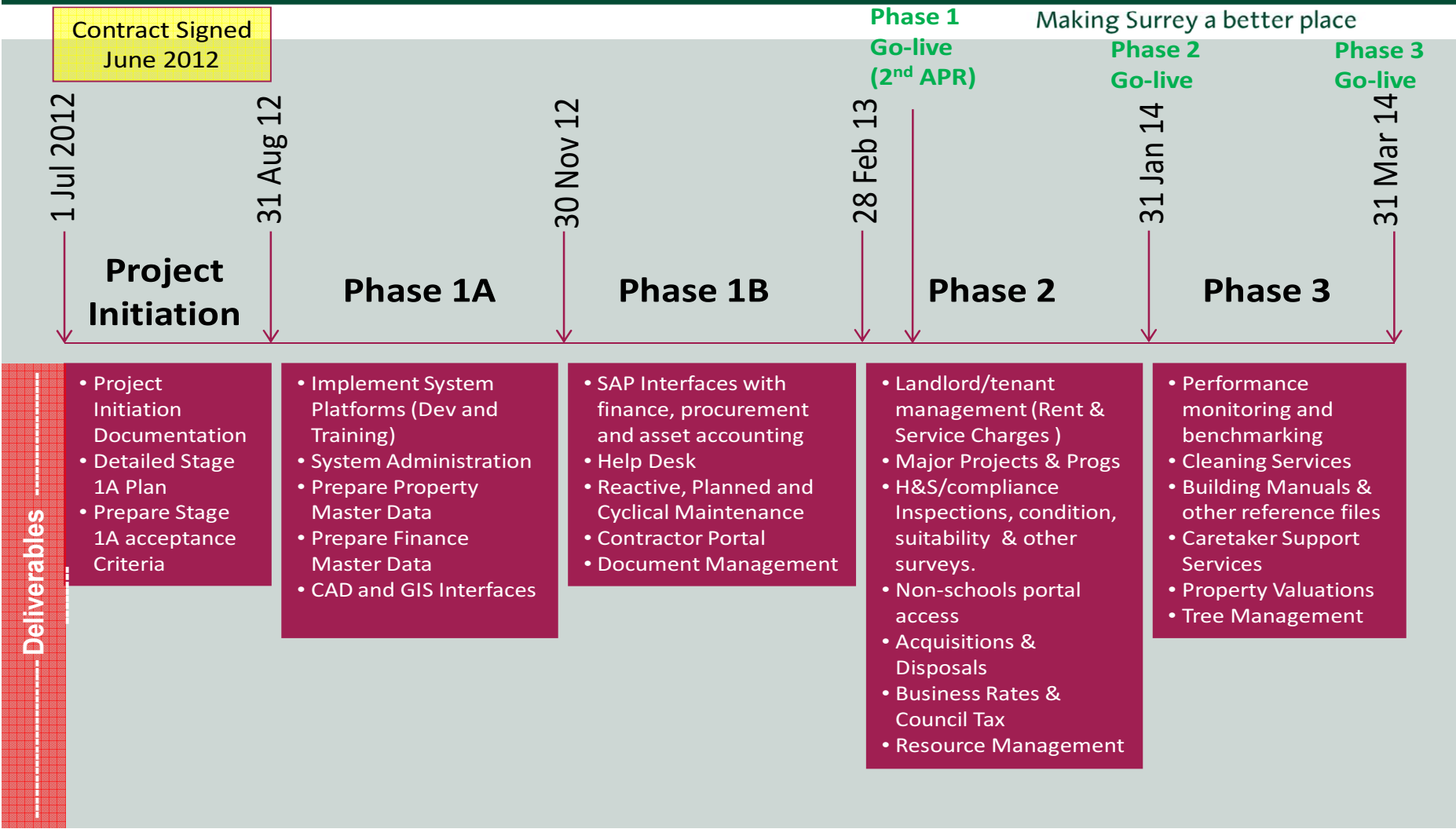
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Sources/background papers:

Audit & Governance Committee
PAMS Implementation Update - Timeline
www.surreycc.gov.uk

SURREY COUNTY COUNCIL

Making Surrey a better place

Contract Signed June 2012

Phase 1 Go-live (2nd APR)

Phase 2 Go-live

Phase 3 Go-live

1 Jul 2012	31 Aug 12	30 Nov 12	28 Feb 13	31 Jan 14	31 Mar 14
Project Initiation	**Phase 1A**	**Phase 1B**	**Phase 2**		**Phase 3**

Deliverables

Project Initiation
- Project Initiation Documentation
- Detailed Stage 1A Plan
- Prepare Stage 1A acceptance Criteria

Phase 1A
- Implement System Platforms (Dev and Training)
- System Administration
- Prepare Property Master Data
- Prepare Finance Master Data
- CAD and GIS Interfaces

Phase 1B
- SAP Interfaces with finance, procurement and asset accounting
- Help Desk
- Reactive, Planned and Cyclical Maintenance
- Contractor Portal
- Document Management

Phase 2
- Landlord/tenant management (Rent & Service Charges)
- Major Projects & Progs
- H&S/compliance Inspections, condition, suitability & other surveys.
- Non-schools portal access
- Acquisitions & Disposals
- Business Rates & Council Tax
- Resource Management

Phase 3
- Performance monitoring and benchmarking
- Cleaning Services
- Building Manuals & other reference files
- Caretaker Support Services
- Property Valuations
- Tree Management