

# Strategic Asset Management Plan

Building a better Surrey





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# Foreword

Management of our assets and the link between buildings and the delivery of services to the residents of Surrey has never been more important.

With challenging economic times and the need to stimulate growth, asset management is now a top priority for central government and the wider public sector.

We in Surrey have a key role to play. We have a high performing council and are continuing to build a 'one team' culture for Surrey. We have already been recognised for our work in initiatives such as the government's Capital and Asset Pathfinder programme and Surrey First.

Our Strategic Asset Management Plan provides a route map that allows our customers, elected members and staff to see our direction of travel and our forward-thinking and innovative approach to property. It includes the whole range of our activities, from investment and acquisition to the day-to-day management of our built estate. All of these areas will be instrumental in improving services in Surrey.

The plan highlights some key actions that members and officers are committed to deliver. We will take a personal role in seeing these through. The publication will be a living document, with subsequent revisions planned on a regular basis.

We are delighted to introduce this Strategic Asset Management Plan and trust that everyone finds it a useful and informative document.



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# Executive summary

## Context

Our purpose is to ensure good quality public services for the residents of Surrey so that they remain healthy, safe and confident about the future. Focusing on residents, value, partnerships, quality, people and stewardship, our vision is by 2017 to be the most effective council in England. The purpose, vision and values are at the core of this Strategic Asset Management Plan.

The importance of our assets and their strategic management has long been a priority for the council. We have recognised the significant positive impact the assets can have on service delivery, often providing the catalyst for service improvement.

Sitting at the core of the Property Services function, this Strategic Asset Management Plan will guide our future property decisions and provide the link between the strategic consideration of assets and their role in the delivery of the council's services. Underpinning the plan is a set of customer-focused actions that both officers and members are committed to deliver.

These priorities run through the core of the plan, providing clarity on the vision and values for the council, how the directorate and Property Services strives to meet these, and the targets against which these will be measured. Of note is the targeted spend through local Surrey suppliers, the CO2 and energy usage reduction, support for regeneration, growth and investment, and the move towards smarter and more flexible ways of working.

In parallel, the plan shows how it will accommodate other drivers which will affect asset management, including national policy areas such as the Localism Act and the Community Right to Bid. It sets out the important role the county council has in working with other public sector partners through initiatives such as Surrey First, and the council's involvement in government programmes such as the Capital and Asset Pathfinder.

Customers, including residents, members, service directorates and staff, are provided with a clear view of how Property Services will work with them through virtual teams and an end-to-end approach to delivery.

All of this is supported by a set of key actions to improve the services and supporting pillars that underpin all of the work, providing rigour in the management, systems and controls for the department.

## Governance framework

A council-wide Public Value Review was carried out in 2010/2011, which found that although the Property function was ahead of the game in its aspirations for a more strategic and customer-centric service, it had some specific areas for improvement. Since then, Property Services has restructured with a new management team in place and an under-pinning structure that covers the property lifecycle as 'one team'. The corresponding culture change is a key strand of the restructure and one which is already starting to see real benefits in the engagement of customers and a joining up across the department.

Led by the Chief Property Officer, a team of five senior managers covers Asset Investment and Regeneration, Asset Strategy and Planning, Schools and Programme delivery, Transformation and Delivery, and Performance Management.

Property Services works within an approved governance framework that provides delegated limits of approval from Cabinet to individual Cabinet members and officer/member groups. These are set in the context of the council's five-year Medium Term Financial Plan and associated corporate processes.

A key area of the governance arrangements is the integration with the service directorates. A concept of virtual teams has been introduced to deliver effective customer relationship management. This allows the customers to have an account team comprising the relevant property personnel which will flex to meet changing demands. It is anticipated that this approach will be extended to link with wider team in the Business Services Directorate.

Building on the efficiency theme and the desire for more cross-public sector working, a cluster arrangement has been set up with Hampshire County Council and a number of other participating authorities, to look at a co-ordinated approach to procurement and delivery of large programmes of capital works. This is already being recognised as an exemplar delivery model across the public sector and is achieving significant savings.

## Policies and strategies

The governance framework set out above supports a set of policies and strategies that span across the whole of Property Services. Some of these are well established and embedded within the council, while others are relatively new and are still developing, having been introduced to meet a particular need or set of circumstances. In summary, the policies and strategies are:

**Carbon management and sustainability** is concerned with reducing the estate's carbon emissions and effectively managing its energy consumption. A programme of work of £13.1m over a four year period is looking at energy efficient schemes, which has already seen a CO2 reduction of 12%. A wider carbon management plan to 2017 has been adopted which is seeking to reduce emissions through management of the estate, street lighting, building design, investment programmes and procurement practices.

Furthermore, the council is part of the Surrey Climate Change Partnership with Surrey Police, the Primary Care Trust and the 11 district and borough councils. This group has developed the Surrey Climate Change Strategy to provide an area-based approach to carbon reduction and sustainability.

**Partnership working** sets out the council's approach to working with our public sector partners in areas such as the property cluster, the projects identified by Surrey First and the co-location of Adult Social Care locality teams. Linked with partnership working, the partners are also exploring new and innovative approaches to the public ownership of property and looking at how partners can build capacity through the sharing of resource.

The schools estate section looks at the asset management approach to the education estate, which comprises in excess of 400 facilities across community schools, foundation schools, voluntary aided and controlled schools and academies.

The Schools and Learning Service and Property Services is developing a plan that will provide an asset management strategy for each area, a five-year schools programme and Medium Term Financial Plan, and a 15-year forecast for infrastructure planning. The teams are also looking at working with the service to develop a set of protocols to provide a consistent approach to school place planning and a clearer and quicker route to decision making. In addition, the Special Education Needs (SEN) strategy is being refreshed and Property Services is helping identify and develop corresponding asset management plans.

The schools asset management plan will be central to the service directorate's strategy development, allowing a long-term planning horizon. This will include building condition, building solutions and a whole lifecycle cost approach.

**The non-schools estate** covers a wide-range of assets that are needed by the service directorates outside of the education estate. Property Services works collaboratively with the service directorates to assess the short, medium and long term impacts on the council's assets and future asset needs. More specifically, Property Services assists the directorates as their strategies evolve, providing supporting strategic advice to assist in the direction of travel and option setting of those emerging strategies which have property and asset implications. Examples of the types of assets include fire stations for Surrey Fire and Rescue, older person homes and residential care provision, waste recycling centres, centres for service for young people and gateways for disability services.

**Office accommodation** has a particular focus in the plan, emerging from the Making a Difference programme. This area looks at more efficient and flexible use of the office estate, enabling the technology to allow this to happen and challenging existing working practices and culture. Property Services is taking a strategic view across the estate and will draw together a business case that contains occupancy needs, staff location, directorates' future needs, desk numbers and flexible working opportunities.

**The Rural Estate** extends to around 1,200 hectares with approximately one hundred tenants occupying a mixture of dairy farms, grassland farms, smallholdings and grazing as well as cottages and rural businesses. Property Services manages this estate with priorities “to optimise the financial, social and environmental returns through proactive management that promotes dynamic involvement with the local communities it serves”. These are underpinned by three objectives:

- 1) optimising revenue and returns
- 2) supporting rural businesses and communities
- 3) supporting good environmental stewardship.

**Housing management** – although not a housing authority, the council holds a portfolio of properties used for residential purposes. These fall into the categories of tied housing, private rented and vacant houses, and gypsy sites. All of these properties need management by Property Services, including management of vacant properties, maintenance, disposals and performance measures.

**Income and Investment Strategy** – the council has powers to acquire land or property which is either planned, where a specific need has already been identified, or opportunistic where a property is offered for sale and the council can demonstrate a clear benefit in acquiring it. For planned purchases, capital within the council’s budget is identified in the Medium Term Financial Plan to provide facilities such as schools.

The council is developing an investment strategy to produce and enhance revenue streams to contribute to service costs and to facilitate economic development and regeneration of towns and other areas in Surrey.

Similarly, the council also has a Disposal / Transfer Strategy which historically was used for surplus assets as a result of changes to service provision. This is now linked to the investment and income strategy with assessment now including potential for alternative use, risk profile, funding, control of delivery and procurement issues.

**Risk management** is part of the council’s Constitution and is embedded in Property Services, being integral in all that we do. As well as health and safety, it covers programme, delivery and financial risk, fire, asbestos, Equalities Act (access) and statutory inspections. An essential part of the risk management approach is the Emergency Planning and Business Continuity arrangements which are there to keep all core functions operational in the event of an emergency.

**Procurement** is managed in conjunction with the council’s strategic procurement function. For Property Services, this means a programme approach to professional sourcing, harnessing opportunities through a detailed knowledge of the supply chain and collaborating with other authorities to get economies of scale and share knowledge. Goals and measures of success are in place ranging from procurement savings, supply chain savings and percentage of construction-related spend through local suppliers.



**Maintenance** - Property Services is responsible for maintaining the council's buildings and their plant and equipment effectively, efficiently and economically:

- to a standard which ensures that the condition of all buildings does not hinder use or provision of services
- to comply with legal requirements
- to maintain the value of the council's property.

As is the case for many local authorities, the council has a backlog of maintenance. This is prioritised to the budget available using a risk management approach, considering future service plans, energy usage, performance trends and condition.

Maintenance is carried out using regimes including cyclical maintenance, responsive maintenance and planned maintenance. Maintenance staff form a key part of the customer-facing virtual teams.

Property Services has in place a buy-back arrangement with schools for maintenance. Presently, up to 75% of schools buy back a service of some kind. A new Buyback service is due to be launched in April 2013.

**Facilities Management (FM)** is the 'first line' of contact for building users and covers the day-to-day management of the corporate portfolio of non-schools buildings. FM takes two approaches:

- 1) Fully Serviced Accommodation, a range of hard and soft FM services across five key council offices
- 2) Integrated Facilities Management, which is a service covering compliance and building management issues in 240 non-school sites.

**The Helpdesk** is the focal point for all building users to log responsive service calls. Providing a 24 hours a day, seven days a week, 365 days a year service, the helpdesk is an important source of intelligence for Property Services and aids greater budgetary control, collaboration between technical and professional staff, and data into maintenance regimes. Future plans are to extend the helpdesk and transform it into an all encompassing Property Helpdesk.



## Action plan and implementation

In preparing this strategic asset management plan, we have not only focused on the work currently being undertaken by the council but have given some real thought to the actions that will improve Property Services. By aligning these with the corporate strategy, it is possible to make the connection between the actions identified and how these support the council's priorities, which in turn benefit the residents of Surrey.

The actions range from development of policy areas through to some very specific tasks, all of which the management team agree are instrumental in improving the service delivered. These actions will be tracked through management reporting processes and will be reported to members on an annual basis.

Supporting all of the work set out in the plan and the corresponding set of actions are the supporting pillars – the management processes, systems and controls that run through Property Services. These fall into four main areas:

- 1) **Performance management** – a framework to monitor the performance and consistency across Property Services, focusing on targets, measured against Key Performance Indicators (KPIs) and monitoring of performance of the department, supplier contracts and performance down to individual asset level. Benchmarking against comparable public sector organisations is undertaken.
- 2) **Financial management** - the Property Finance team provides professional financial information, analysis, advice and support, produces all external financial reporting on council activities and lead on the council's annual budget setting and in-year monitoring arrangements. The finance team also sets the financial framework for the council, covering the regulations, instructions and guidance on all financial activities.
- 3) **Data management** - property data is recognised as a key tool in driving value from the council's property assets. It is used for the day to day management of assets, measuring their performance and providing information to support asset strategy. Integral to the management of data will be the implementation of a new Property and Asset Management System (PAMS), which is currently underway in a joint initiative with Hampshire County Council. PAMS will provide a fully integrated property information system that will facilitate partnership working, bringing together property asset data, financial information, maps, spatial information from CAD plans, and document management. PAMS will assist public sector partners in the sharing of property data. It will also aid management of the plethora of property documents held in the department and help make property information more accessible and transparent, both internally and externally.
- 4) **Reporting** - is key to decision making in Property Services and supports the governance process and general management of property business. It is broken down into three categories: 1) decision making – at departmental, directorate and Cabinet level; 2) performance - regular reporting of key performance indicators at departmental and directorate level; 3) business planning and improvement – regular reporting of progress against plans and targets at departmental and directorate level.



# Context

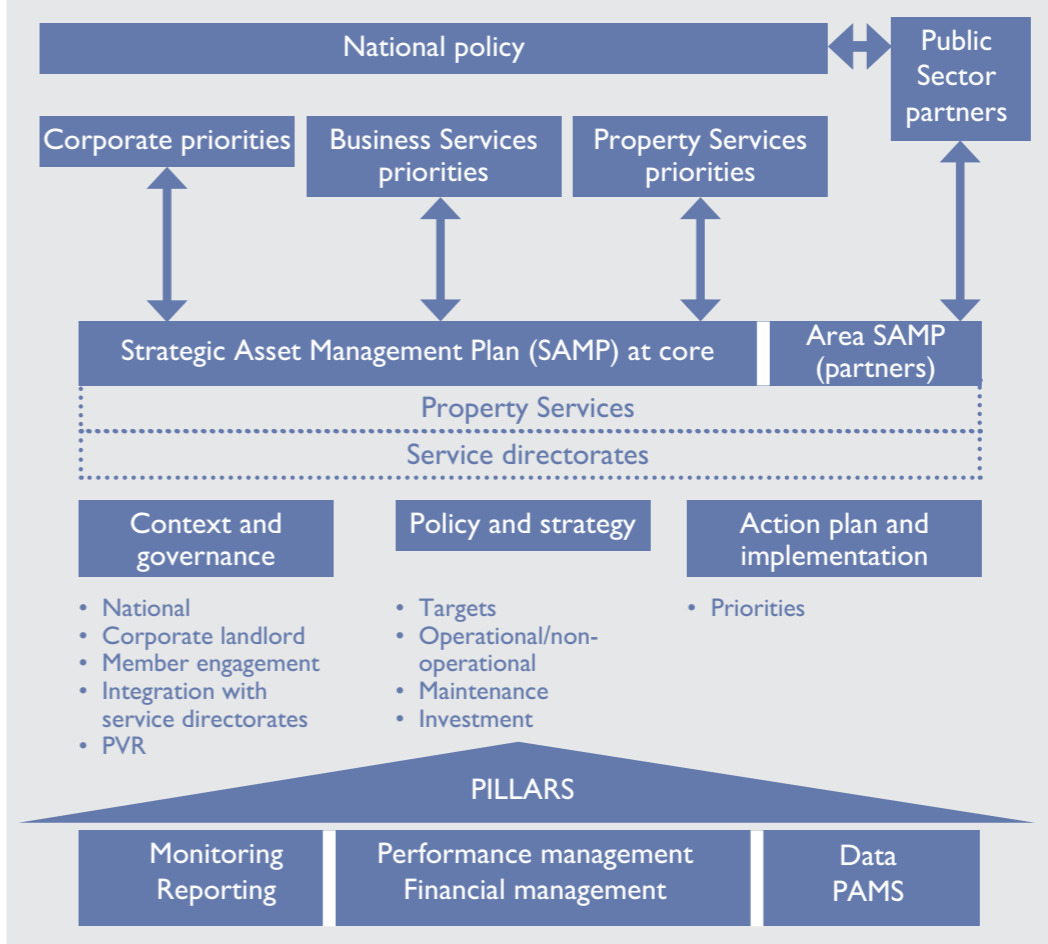
## Context for the plan

### Why have a plan?

Surrey County Council's Strategic Asset Management Plan will guide our future property decisions and provide the link between the strategic consideration of assets and their role in the delivery of the council's services.

The importance of our assets and their strategic management have long been a priority for the council. We have recognised the significant positive impact the assets can have on service delivery, often providing the catalyst for service improvement.

Our Strategic Asset Management Plan sits at the core of the Property Services function, and will be reviewed regularly. It provides a reference for policy decisions that influence asset management and is a focal point for asset management debate and the inevitable impact from external factors that will have a bearing on the council's assets. In particular, one area of change is the national drive for public services and the bodies that deliver them to be more joined up. We are already embracing this approach through initiatives such as Surrey First, as are other public sector bodies with significant land holdings, such as the Ministry of Defence and the health service.



The diagram on the left illustrates the plan in context. It shows how the plan acknowledges the Corporate Priorities, the priorities of the Business Services Directorate and the Property Services priorities, and uses these as principal reference points.



The plan brings a customer-focused approach to asset management that affords officers and members a long-term planning horizon, instilling confidence in decisions and bringing a consistency of approach across the council. The involvement of service directorates in the creation of the document has been instrumental in garnering feedback on the proposed asset management direction and improvements to the property service.

The plan brings a transparency to our work and provides clarity on all areas of Property Services and the inter-dependencies within the organisation and with partners.

Underpinning the development of the plan is a set of actions that will be taken forward to improve service to customers. The actions will be monitored and progress reported to the council on a regular basis. Of particular importance is the audience; our expectation is that the plan will be read by councillors, officers, members of the public, other public sector partners and those from the voluntary sector, as well as being in regular use by our staff.

### What does the county council's estate look like?

Property Services has responsibility for an extensive portfolio of operational and non-operational premises, many individually designed and constructed over several decades, others acquired more recently under mixed tenure arrangements. Service delivery includes the design of new buildings, the management and maintenance, refurbishment and adaptation of existing buildings, the purchase, sale and development of land and property, management of leases and other agreements, and tenancy management including rents/service charges payable and receivable. Property related services are also provided to external clients through service level agreements.

The council's property portfolio includes about 700 operational assets with a further 400 non-operational assets, including land over 0.5 hectares in size. In all there are approximately 3,000 buildings on these sites. There are also approximately 2,000 pieces of land less than 0.5 hectares in size. The majority of assets are owned freehold, although many are held on lease. The school estate comprises 303 nursery, infant, junior and primary schools, 53 secondary schools, 23 special schools, 10 Short Stay Schools, of which 97 are voluntary aided schools and 33 are Academies.

Properties within the portfolio include:

**Operational Estate** – these are the assets that are used to deliver services to the community, including:

- schools and other educational premises
- youth centres
- residential homes and day care centres
- adult education centres
- libraries
- fire stations
- office buildings
- highway depots and civic amenity sites.

**Non-operational Estate** – these are the assets that the county council holds to meet other council objectives, including:

- small business centres
- smallholdings and farms
- gypsy sites
- vacant land and buildings
- tenanted buildings
- garden Licences
- staff housing.

## National, local and corporate policy

### National policy drivers

Overarching national policy impacts many of the services delivered by the council. Against the backdrop of the economic climate, more recently there has been a number of new and revised policy areas that have been specifically targeted at assets and how these can be used to promote growth. These include:

- **community right to bid (assets of community value)** - the Localism Act requires district and borough councils to maintain a list of assets of community value which have been nominated by the local community. When listed assets come up for sale or change of ownership, the Act gives community groups the time to develop a bid and raise the money to bid to buy the asset when it comes on the open market. Assets held by the county council may be nominated for these lists.
- **the Localism Act** also introduces a General Power of Competence, which is designed to provide local authorities with the same powers as any individual. This may create a number of new opportunities for the county council in terms of its strategic asset management. For example, there may be scope to consider a wider range of strategic land purchases, which would currently need to satisfy the “wellbeing” requirement introduced by the Local Government Act 2000.
- **Community Infrastructure Levy (CIL)** - the Community Infrastructure Levy is a new planning charge, introduced by the Planning Act 2008. It came into force on 6 April 2010 through the Community Infrastructure Levy Regulations 2010. Development may be liable for a charge under the Community Infrastructure Levy, if the local planning authority has chosen to set a charge in its area.

## The county council's corporate priorities

In 2012, the council set out its Purpose and published a Vision for 2017, all underpinned by a set of Values that are embedded throughout the organisation.

The council's purpose is to ensure good quality public services for the residents of Surrey so that they remain healthy, safe and confident about the future.

Our vision looking forward to 2017 is to be the most effective council in England.

Many councils are responding to the challenges they face by reducing their capacity and capability. We are taking a different approach to build on our strengths and deliver better services.

The focus to achieve the vision is centred around six principal strands, telling a story of how we will transform the way we work with residents, businesses, partners, and staff to tackle the issues facing Surrey:

- 1) Residents – Individuals, families and communities will have more influence, control and responsibility
- 2) Value – we will create public value by improving outcomes for residents
- 3) Partnerships – we will work with partners in the interests of Surrey
- 4) Quality – we will ensure the highest quality and encourage innovation
- 5) People – we will develop and equip officers and members to provide excellent service
- 6) Stewardship – we will look after Surrey's resources responsibly.

At the heart of the council's desire to make a difference is a set of values that are embedded throughout the organisation:



**Listen** – we actively listen to others and expect to be listened to



**Responsibility** – we take responsibility in all that we do at work



**Trust** – we work to inspire trust and trust in others



**Respect** – we are supportive and inclusive and committed to learning from others

The purpose, vision and values are at the core of this Strategic Asset Management Plan and act as a reference point for all asset-related work undertaken by Property Services.

## Business Services priorities

Property Services sits as one of the core functions in the Business Services Directorate and is inextricably linked with the other functions in the directorate, which are: Finance, HR and Organisational Development, Information Management and Technology, Procurement and Commissioning, Shared Services and Transformation.

The directorate's vision for 2017 reflects the residents' priorities and areas where investment is needed, for which assets play an important role.

The vision is to be the leading public service provider of innovative business solutions and transformational change by 2017. A number of the directorate's specific priorities have particular relevance to strategic asset management, including:

- helping the council to save £100m over five years
- supporting the local economy by driving 60% of spend through Surrey suppliers
- reducing CO2 emissions and energy usage by 21% from the 2009/10 baseline by 2012/13
- identifying and developing opportunities to maximise the use of assets to support regeneration projects and the economic growth agenda in partnership with external organisations
- completing the co-location programme with the 11 district and borough councils
- supporting staff to work in a smarter way – 55% of the county council office-based staff will work in a more flexible way through the use of new technology
- continue to develop and deliver income and efficiencies through partnership working.

These priorities are by no means exhaustive and assets still have an indirect role to play in all the remaining priorities for the directorate.

## Property Services' priorities

Property Services' priorities flow from the priorities of the directorate. They run right through and feature heavily in this Strategic Asset Management Plan, providing a reference and path back through the Business Services Directorate priorities and the corporate priorities.

Property Services' vision is "to be a catalyst for economic development and regeneration within the county, through investment in existing and new opportunities that will drive new income streams and enhance value for money from existing assets."

Stemming from the corporate vision, the six key areas for Property Services are:

**Residents** - In Property Services we will deliver excellent services by putting residents and customers at the heart of our delivery, listening to what they tell us and how we can improve.

**Quality** - In Property Services we will implement efficient and robust processes supported by governance to achieve best possible quality buildings and environments and striving to continuously improve the customer experience.

**Value** - In Property Services we will reduce the cost of managing the Surrey County Council portfolio and deliver income generating opportunities for delivering a service that is commercially competitive.

**People** - In Property Services we will create and continually enhance a service of a team of highly skilled people who respect one another and those around them, working as one team, taking responsibility, as experts, for identifying and delivering innovative solutions.

**Partnerships** - In Property Services we will nurture strong, sustainable links with current and future partner organisations to achieve benefits for all.

**Stewardship** - In Property Services we will provide a safe and healthy environment to all users of our assets, developing and implementing sustainable property solutions, reducing our impact on the environment.

To realise our vision we have prepared this Strategic Asset Management Plan, which focuses on income generation, economic regeneration and fit for purpose assets through:

- a targeted investment strategy, that creates income streams and will create a step change for the council to become less reliant on council tax / council tax increases to support service provision
- a clear strategy and approach to assessing fitness for purpose of the county council's assets to ensure a continual enhancement to both internal and external customer value, placing the customer at the heart of the property process. This will deliver financial, environmental and service benefits
- creating a motivated, focused and empowered team of professional property individuals that both public and private sector organisations want to engage and partner with. Through joint working we will create long term, mutually beneficial relationships that deliver an improved supply chain and access to opportunities.

Working through up to 2017, we will continue to develop and will have:

- set out the framework and structure to identify, improve and streamline the council's asset base to create a vision, direction and process for the next five years and beyond.
- delivered an income strategy through our current asset base and acquisitions, as part of the directorate income strategy
- reduced demand for responsive revenue expenditure by 25% by 2016 against a base year of 2011/12
- reduced the back log of repairs by 20% in those buildings to be retained over the current Medium term Financial Plan
- reduced the reliance on leasehold and tenanted properties and refocus the portfolio to a freehold asset base. Using the freehold and long leasehold assets to deliver income to the council
- created joint working projects with all 11 district authorities within the county
- delivered the Surrey First ambitions and objectives of partnership working, co-location and the principles and benefits of being joined up.

## Property Services targets

The Property Services targets can be summarised as:

	Goal	Benefit	Owner	Strategic theme
1	Improve our responsive maintenance contractor performance	Our customers will receive a more efficient and effective service	Transformation and Delivery Manager	Quality, Residents, Value
2	Delivery of the Strategic Asset Management Plan	It will provide a framework and structure to identifying, improving and streamline SCC asset base to create a vision, direction and process for the next five years and beyond.	Asset Strategy and Planning Manager	Residents, Quality, Value
3	Reduce CO2 emissions and energy usage from council buildings by 30% from the 2009/10 baseline by 2013/14	We will reduce our energy consumption and carbon emissions, making better use of both environmental and financial resources	Energy Manager	Stewardship, Residents, Value, Partnership
4	Identify and develop opportunities to maximise the use of assets to support regeneration projects and the economic growth agenda in partnership with external organisations for the benefit of Surrey residents	A focus on partnerships and sharing space will deliver efficiencies across the public sector and provide fit for purpose assets.	Asset Strategy Partners	Partnership; Value

## Public Value Review

During 2010 / 2011, the council carried out public value reviews (PVRs) of all its key activities. This included a review of the entire property function. The review looked in detail at the costs of delivering the function and the break down and value of activities. The review also looked to best practice and knowledge sharing externally to compare our own property function to that of other public and private sector bodies. Finally, the review engaged widely with customers and with staff to understand how the service was delivering on the ground.

Overall, the findings were that we were on par with property functions in other organisations in terms of process delivery. In fact we were ahead of the game in terms of our aspirations for a more strategic service that was customer-centric. In order to support our move to a best in class property function, the PVR made the following key recommendations:

- implement effective systems and processes to develop robust Key Performance Indicators (KPIs) and meet customer expectations
- develop and implement an improved customer service model
- restructure Property Services to improve efficiency and customer focus
- drive a more responsive and proactive team culture
- develop greater market, financial and commercial skills across the service.

These recommendations were signed off by the council's decision-making Cabinet at the end of 2011. Since that time, Property Services has restructured its skills and resources in two phases, restructuring the management team first to enable them to take the lead in the full team restructure. We have also taken key steps forward in the culture change work, particularly around our engagement with and empowerment of managers. Alongside all this, process improvement is ongoing, in particular the new Property Asset Management System has been procured and is now undergoing development with direct involvement from our team. The service has simultaneously been able to deliver efficiencies in terms of resourcing and procuring of services.

A detailed action plan from the PVR provides the basis for the Property Services improvement plan over the coming years. This will be integrated with the action plan resulting from this Strategic Asset Management Plan to provide a practical way forward for the service.

## Surrey First

Surrey First is a shared services project that is improving joint working between the twelve Surrey councils and Surrey Police. Surrey First's mission is to bring as many Surrey-based public sector organisations together to promote collaboration on Procurement, Human Resources, Information Technology and Property Assets. The desired outputs are to create efficiencies, improve services for Surrey residents and businesses and ultimately produce savings for the combined public purse.

An asset workstream is in place that aims to improve the way that public sector assets are managed within Surrey. The public sector partners have expressed a common desire to share buildings and facilities across the county to improve services and reduce costs.

An ambitious public sector estates review was completed in 2011 which uncovered 18 significant opportunities for asset collaboration. Together these 18 totalled 153,000 sq m of space which, through collaboration, could be reduced by 21.5% to 120,000 sq m with estimated capital and revenue cost saving of £67m in Net Present Value terms over 25 years.

Over the next 10 years, Surrey First's collective asset strategy will be three-fold:

- 1) more joint projects and resources devoted to them, to unlock the potential savings
- 2) greater utilisation of the public sector buildings with a particular focus on offices which offer the greatest scope for space reduction
- 3) free up space and land for redevelopment and job creation for the benefit of Surrey's residents and businesses.

## Capital and Asset Pathfinder

In 2011, Surrey First was selected as one of the second wave of pathfinders for the Government's Capital and Assets Pathfinder programme. The programme is sponsored by the Department for Communities and Local Government (DCLG) and tests a customer-centric and place-based approach to asset management and capital investment in the public estate.

Central to the Pathfinder approach is the principle of 'one public estate' - an examination of the greater efficiencies and improvements in service delivery that can be obtained through collaboration between the public sector partners in a place, when all publicly owned assets are considered as if they are a single portfolio.

Led by the county council, two business cases followed by a 10 year implementation plan were produced for DCLG and the Local Government Group. The business cases focused on two specific scenarios that had been identified in the Surrey-wide public sector estate review:

- 1) a public sector hub led by Spelthorne Borough Council at Knowle Green, Staines
- 2) a cultural and service hub led by Surrey Heath Borough Council in Knoll Road, Camberley.

Both projects are progressing. In particular, for Knowle Green a viability study has been completed and presented to the county council's Investment Panel. This identified potential for substantial savings across the public sector organisation. A joint working agreement is being prepared between parties, which will set out the protocols for sharing, financing and the apportionment of risks and benefits.

A 10 year implementation plan has been prepared, which sets out an approach that will:

- enable partners to come together locally to develop an area wide approach to service delivery and asset management over the next 10 years
- use Surrey First's two business cases for a public sector hub in Staines and a cultural and service hub in Camberley and the property rationalisation opportunities identified during late 2010 to demonstrate the space reductions and cost savings possible on 18 projects totalling 150,000 sq m of space
- identify land that the public sector could free up for housing and commercial uses from those projects
- indicate the potential difference in the number of property holdings now and in 2022, especially with regard to back office space
- demonstrate how the business cases and other schemes will be progressed.



# Governance framework

## Structure of Property Services

Property Services is part of the Business Services Directorate. The Chief Property Officer reports directly to the Business Services Director and forms an integral part of the Directorate Leadership Team.

The management team of Property Services has been restructured to pull asset strategy into the one property team and provide greater clarity on ownership of elements of the property lifecycle. This is already proving successful in the increased ownership felt by managers, the clarity that has been gained on roles and responsibilities and the greater understanding of how people need to work together.

We have developed the senior front line delivery role to include transformation as a recognition of the change the service needs to make in how it delivers services to its customers.

We have also recognised the importance of performance management to ensure that we achieve success and have defined a role within the senior management team that will oversee the service's performance.

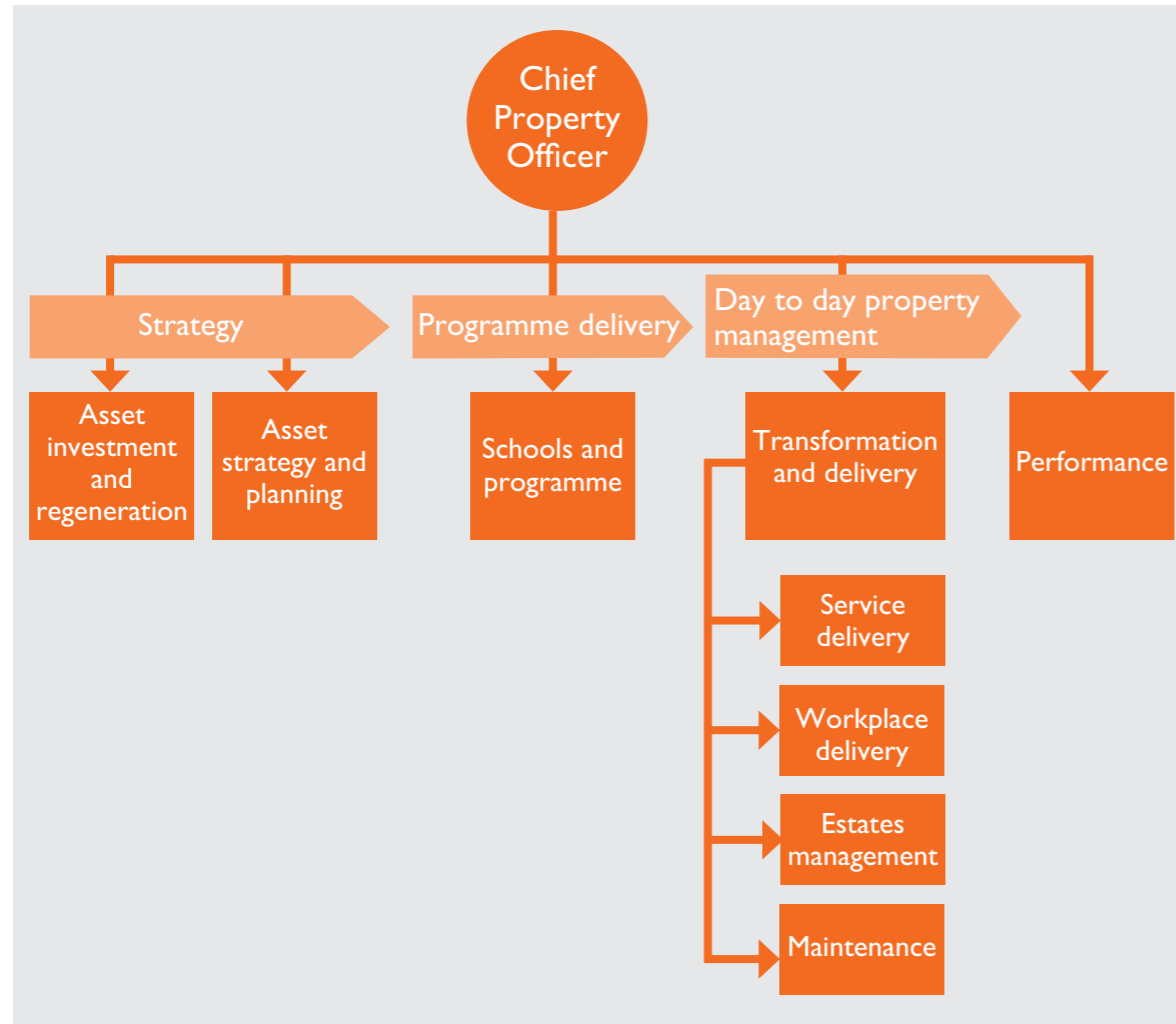
### Cultural change

We have already done a lot of work within Property Services about what culture we need against the culture we currently have. The team have identified actions and activities that can take place to start to shift culture and actions are underway.

Improvements already made include:

- creating a much stronger cross working environment within the management team with managers taking ownership for service strategy and direction
- engaging with a broad range of customers on how the customer relationship model will work. This has received very positive feedback
- engaging in detail with staff in the development of structure to ensure understanding and ownership of the new structure.

The below chart summarises the senior management structure.



Alongside this formal structure, the Property Service operates virtual teams which enhance the cross-working across functions

## Approvals and committees

Approval and governance processes are in place to balance the need to have scrutiny and financial control over decisions, with the ability to bring projects quickly to fruition and, in the case of strategic acquisitions for services, corporate and investment, take opportunities in the property market.

The approval process is illustrated as:

- All capital projects over £100k are reviewed by a senior officer group – the Investment Panel - to create continuity before spend is committed. The Investment Panel (made up of senior officers).
- All projects over £500k require approval of a Cabinet Member.
- Full Cabinet approve all projects over £1m. This requires the development of a Strategic Cabinet Report.
- Once go-ahead is approved, the project may require Procurement Review Group approval (single contract value in excess of £100k) for routes to market and subsequent award of contracts for consultants to develop detailed plans and designs.

- Further Cabinet approval must be sought once detailed planning and design is complete and again Procurement Review Group approval will be required to go to market and award contracts to contractors to deliver the project.
- The full capital budget is developed on a four-year rolling plan and monitored through monthly budget reporting. New requirements on the capital budget will be managed in an iterative process between Finance and Property.

The full capital project management process is currently the subject of a “Lean” review which will look at all aspects of the process to try and deliver efficiencies in time taken to deliver projects. This will include a review of the approvals and committees process in order to propose improvements where necessary. This will form part of the action plan.

## Member engagement

As part of ensuring an effective engagement process, all members are invited to attend regular drop-in sessions to individually go through property matters in ward areas to ensure local issues and ideas are captured.

Members are also formally consulted on decisions being presented to Cabinet or Committees to ensure their views are known when property decisions are due to be made within their ward and alongside this.

Local members are formally consulted on any disposals to ensure local views are known and taken into account and transactions are therefore being carried out in a transparent manner.

## Budget governance

Team budgets, both revenue and capital, are monitored regularly with monthly liaison between Property Services Performance Management and the Property Services teams, with reporting feeding into the council's overall budget setting procedures, such as the council's five-year Medium Term Financial Plan and associated corporate plan processes.

Sometimes, in liaison with finance and service directorates, additional temporary funding streams can be identified and sourced through other budgets associated with Corporate/ Service Directorate /External Parties (such as government departments) which can supplement above property capital and revenue expenditure budgets of Property Services.

## Integration with service directorates

### Vision of service directorates

The visions for the service directorates are set out below. These visions tie into the five-year Corporate Plan objectives (2013 to 2018).

#### Childrens Schools and Families

“Every child and young person will be safe, healthy, creative, and have the personal confidence, skills and opportunities to contribute and achieve more than thought possible”

#### Adult Social Care

“Working with all our partners to make a difference to the lives of people, through trusted, personalised and universal social care support, so people have choice and control, and can maximise their wellbeing and independence in their local community”

#### Customer and Communities

“To enhance quality of life through supporting healthier, safer and more vibrant communities”

#### Environment and Infrastructure

“A leading and sustainable economy, a safe and attractive environment in our towns and countryside, and better roads, transport and communications networks”

#### Chief Executive’s Office

“To have enabled and assisted Surrey to deliver the most effective and efficient services to residents”

#### Business Services

“To be a leading public service provider of innovative business solutions and transformational change by 2017”

These visions enable services to develop strategies and policies.

With these service strategies/policies in place, a strategic approach is taken as part of our strategic asset planning relationship with service directorates, ensuring better focused planning on short, medium and long term investment, rationalisation of operational assets, and asset partnering with other third parties.

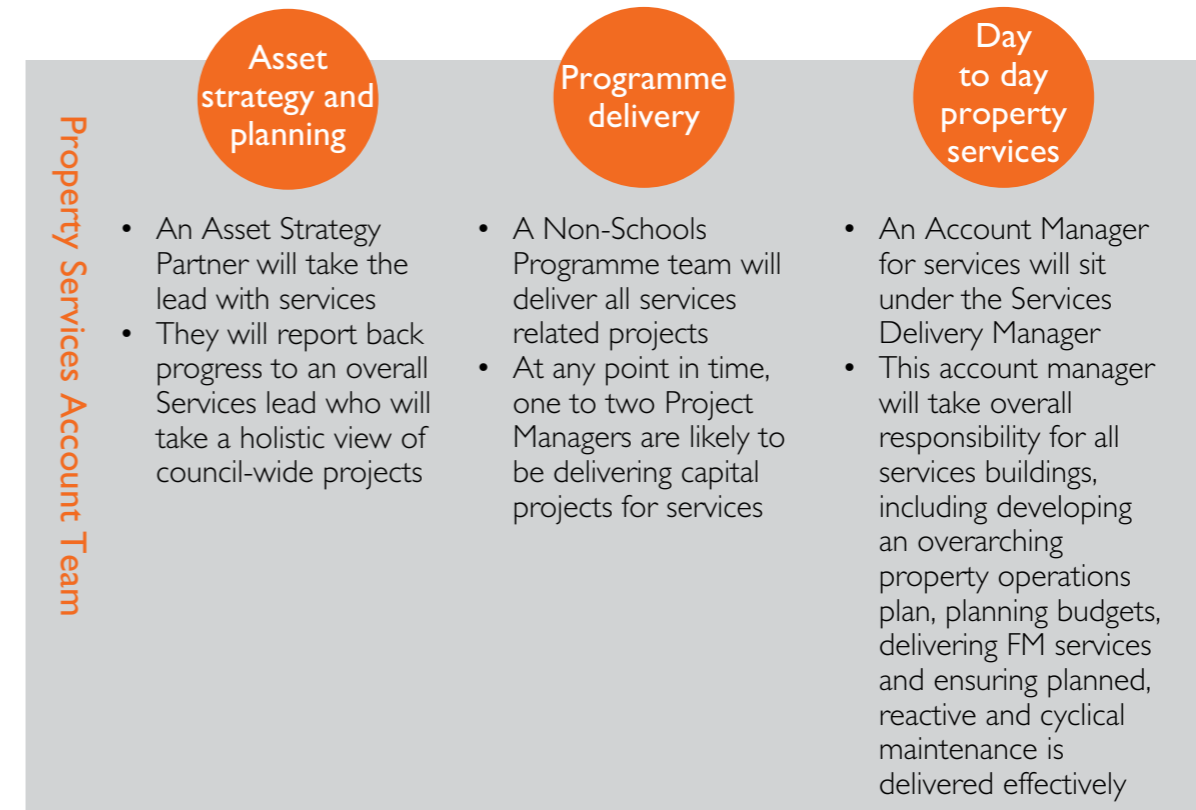
### Customer relationship management

Property Services has implemented the concept of virtual teams to delivery effective customer relationship management. Customers require the following from their property service:

- ease of contact – limited individual points of contact
- Property Services to understand their needs and specific issues
- a joined up property function
- a commercial property function that can be benchmarked with other providers.

The concept of the virtual teams pulls together relevant property personnel into formal account teams for each service. These account teams meet regularly and work together with the services across the strategic and operational spectrum to understand and meet their asset requirements. The below diagram shows who will make up the virtual teams:

### Proposed structure for services

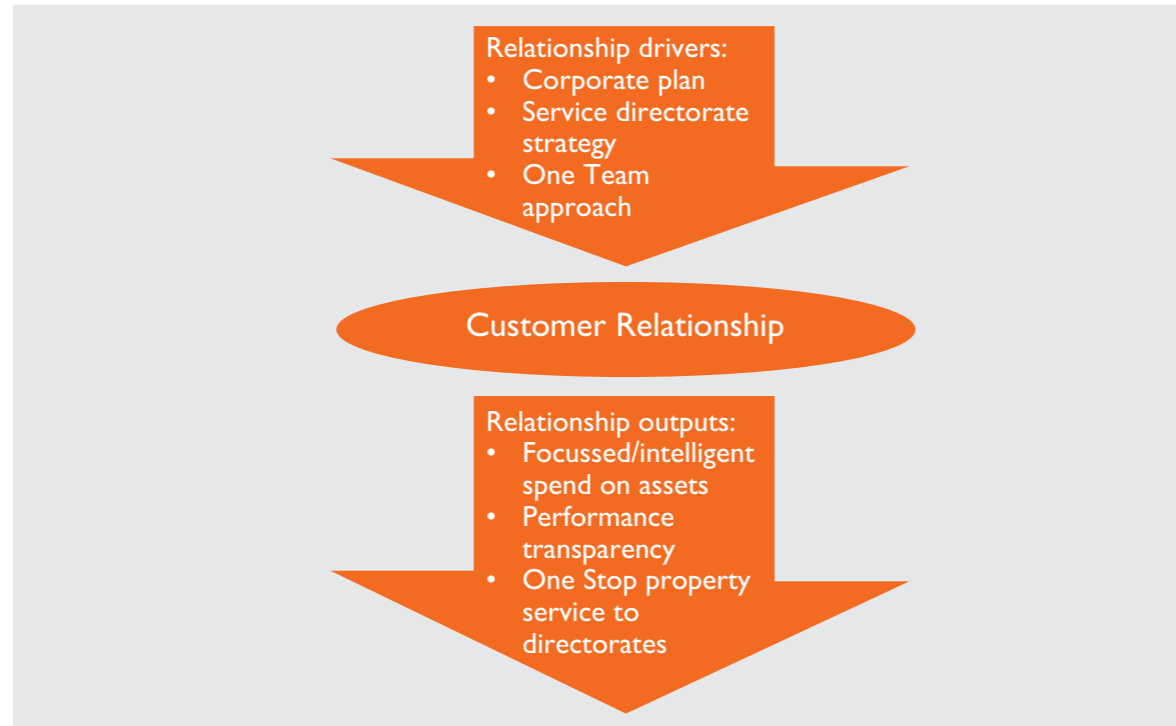


Going forward, it is expected that the virtual teams within property will link to wider teams within Business Services to ensure that services receive a joined up service from the entire support function.

This method of customer relationship management will deliver the following improvements:

- service directorate and corporate goals focused and linked, whereby a balance is achieved in line with wider corporate objectives and the council’s Medium Term Financial Plan
- greater transparency and understanding between the service directorates and Property Services of what can be achieved both strategically and operationally
- achievement of service-related efficiencies and objectives from their occupation of assets
- implement property cost efficiencies in terms of usage, co-usage, suitability, condition, available revenue budgets including environmental cost factors
- identify potential rationalisation and freeing up of surplus property so it can be used for other income generation sources including capital receipts
- resultant delivery and progression of a robust Strategic Asset Management Plan.

The inputs and outputs of the customer relationship are summarised below:



## Property Services cluster

The cluster arrangement is a collaboration between Surrey County Council, Hampshire County Council and Reading Borough Council. It takes a co-ordinated approach to the procurement and delivery of large programmes of capital works through partnership working, and is the collective authorities' response to the challenging economic climate and recently published public sector thinking on delivering value to ratepayers through the public estate.

The cluster's objective is to be at the forefront of Government Construction Strategy thinking and become recognised as an exemplar delivery model across the public sector.

### Background

In 2011 the government published two reports that it had commissioned with regards to capital and construction strategy - the Review of Education Capital April 2011 and the Government Construction Strategy May 2011. The reports highlighted a common theme for the need to improve value for money to taxpayers through the construction procurement and delivery process.

The findings informed and shaped the key objectives for the cluster, which are:

- combining public sector resources to deliver significant cost savings
- supporting each other in skills development
- engaging with private sector (contractors and consultants) in a joined-up and robust way to maximise performance
- acting as an exemplar of shared services to demonstrate best practice in local government.

The cluster directly supports the council's strategy to develop and grow partnership working between public bodies, and in doing so enables the sharing of professional capacity and economies of scale between the organisations. This is enhanced with the added engagement of private sector partners, who bring both expertise and capacity to the arrangement.

## Surrey County Council's role

The work of the cluster is focused through a joint programme office that provides the central reporting and control for the projects being delivered. This programme office comprises a multi-functional team of varying professional disciplines and business support functions, importantly with resource being provided by the authorities involved and private sector support.

The county council's role within the office is threefold, comprising:

- procurement and supply chain leads
- representation on the various operational, project and steering groups; and
- overall governance through the Joint Property Board.

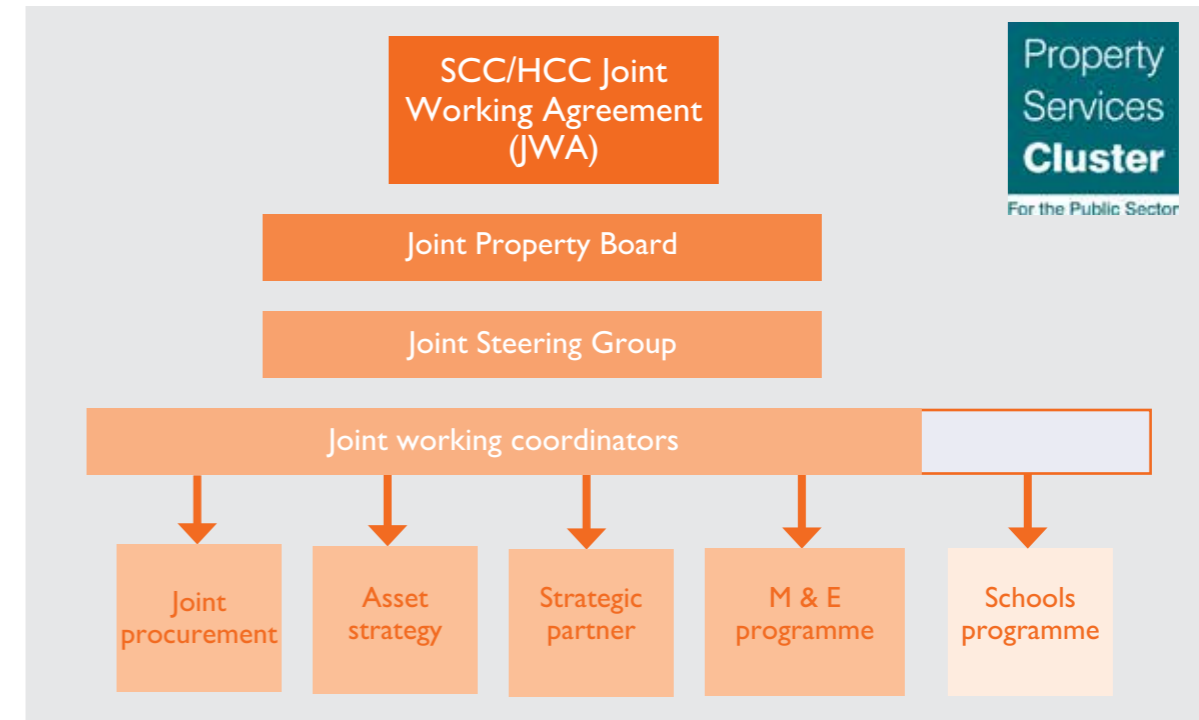
### Cluster governance

The governance framework covers the end to end delivery and management processes required for developing, procuring and delivering programmes and their individual projects, from initial viability to handover of the completed facility for occupation and ongoing facilities management.

### Joint Working Agreement (JWA)

The two lead authorities - Surrey County Council and Hampshire County Council - entered into a Joint Working Agreement in June 2011. This agreement established a Joint Property Board for the purpose of providing strategic direction and supervision of the JWA and a steering group to oversee the overall development of all major workstreams and programmes of work.

A high level governance structure is shown below.





# Policies and strategies

## Carbon management and sustainability

Surrey County Council is committed to reducing its carbon emissions and effectively managing its energy consumption in its own estate including publicly funded schools and street lighting.

In 2009 our Cabinet approved a Carbon and Energy Policy 2010-14 that set out targets and policies to achieve this goal, including an overall target to reduce the council's carbon dioxide (CO<sub>2</sub>) emissions by 20% by 2014 and a stretch target of 30% reduction in CO<sub>2</sub> emissions by 1 April 2014. Cabinet also endorsed the Surrey Climate Change Strategy detailed under the climate change section.

### Delivering cost effective lower carbon solutions

Council and Cabinet have approved a carbon reduction programme of work for energy efficiency schemes valued at £13.1m over a four-year period 2010 - 2014. The business case for invest to save projects is driven by the ability to reduce carbon emissions at the same time as lowering costs and offset financial risk in the shortest payback period.

The Carbon Reduction Programme will focus on replacing old and inefficient heating boilers/lighting and associated control systems. Automatic lighting controls and upgraded heating controls are to be included at high energy user sites. Fuel switching from oil to biomass or gas and the installation of Smart meters or automatic reading meters (AMR) for large electricity and gas supplies started in 2010/11. After two years into the programme a CO<sub>2</sub> reduction of 12% has been achieved.

### Management of the Carbon Reduction Commitment (CRC) Energy Efficiency Scheme

The Carbon Reduction Commitment is an obligatory UK-wide carbon trading scheme that includes all large public and private sector organisations. Complying with CRC is onerous in terms of complexity and knowledge to meet the legal requirements and to avoid fines. By way of example, the council's buildings emit over 90,000 tonnes of carbon dioxide into the atmosphere each year, representing carbon allowances to the value of around £1m per year.

### Carbon Management Plan 2009-2017

Recognising that climate change is the largest environmental challenge facing the planet, the council has adopted a carbon management plan to control its buildings' energy use.

Property Services is committed to cut carbon emissions through the management of our estate, including schools, street lighting, building designs, investment programmes and procurement practices.

## Carbon and energy

Property Services provides a professional service to a portfolio of over 650 sites such as schools, offices, care homes, fire stations, libraries, adult and children's centres. This is focused on delivering energy reductions and cost savings.

A whole range of services is undertaken, including:

- Energy Management database Monitoring and Targeting system – allows free access to bursars and Building Maintenance Officers to manage budgets and monitor energy usage and promotes energy efficiency and carbon reduction.
- Installation and management of Automatic Meter Reading (AMR) – 1200 meters supplied under the carbon reduction capital programme to identify energy waste.
- Energy and water management advice - top tips are published on bulletin notices.
- Constructing and managing energy saving projects.
- Programme of invest to save energy efficiency improvement works - £10m of investment during the past four years to target 20% to 30% energy reduction.
- Promotion of grants and incentive scheme to schools – promoted the take up of solar panels at over 20 schools as part of the Feed in Tariff.
- Options for low carbon technologies – plans to install 12 wood burning boilers in 2013 as replacements for oil or gas boilers.
- Energy procurement contracts – flexible energy contracts valued at £11m are arranged for the corporate properties and the majority of schools.
- Promotion of energy awareness and good house keeping – training and awareness sessions are provided for the corporate facility managers.

### The Surrey Climate Change Strategy

The Surrey Climate Change Strategy was developed by the Surrey Climate Change Partnership (SCCP), a partnership between the county council, the 11 borough and district authorities, Surrey Police and the PCT, as part of a climate change project funded by the Surrey Improvement Partnership (SIP). The strategy has been designed to give strategic direction on climate change action and activity for local authorities within Surrey, whilst recognising the different levels of existing activity and support for this agenda. The strategy is endorsed by the Surrey Climate Change Members Group and the Surrey Strategic Partnership Leadership Group, and is seeking formal approval by all Surrey local authorities.

Common priorities for Surrey local authorities were agreed as:

- reducing carbon emissions in our own organisations
- engagement with Surrey schools
- maximising gains from the planning system to make new developments sustainable
- tackling emissions in the existing residential stock
- identifying opportunities for renewable and sustainable energy within Surrey
- the need to increase the profile and show leadership on climate change activities
- an increased focus on climate change adaptation.

## Partnership working

The council already has a strong track record in working in partnership with other public bodies, including districts and borough councils, police, health and voluntary sector. This has crystallised as part of the work on the Capital and Asset Pathfinder and Surrey First, and the projects that have emerged are a true demonstration of how the public sector can work together.

Furthermore, the work under the cluster arrangement has seen Surrey work in partnership with both Hampshire County Council and Reading Borough Council, sharing resource, experience and driving economies of scale for the benefit of customers.

Though the work is still in its early stages – bearing in mind that these projects often span many years – good progress has been made in terms of sharing of data, use of joint systems and expanding the work of Property Services beyond Surrey.

The focus on partnership working will become ever more critical as future comprehensive spending reviews reduce available funding for projects and public bodies seek to look at more innovative solutions to work together.

### Partnership working in practice

Implementation of the Capital and Assets Pathfinder and partnership working with other public sector partners in Surrey is an integral part of the County Council's strategic asset management direction.

Eight partnership projects are currently at feasibility or viability stages in six boroughs. Partners include Surrey Police, district and borough councils, voluntary and community sector organisations, the Probation Service, Surrey County Council services, and housing associations.

Based on the partnership work to date, the benefits of these schemes include:

- reduction in the number of public sector buildings in operational use through flexible working and intensification of use
- significant reductions in annual operating costs for the public sector property
- reduction in backlog maintenance liabilities
- providing commercial letting space for private sector income generation
- improved service delivery through joining up services in a single building solution
- improved working conditions for staff through modern buildings.

Other initiatives include the co-location of Adult Social Care locality teams in district and borough offices across the county.

### Looking forward

As partnership schemes are generally multi-agency projects there are a number of challenges that need to be addressed. The partners may have to explore new and innovative approaches and ways of thinking in regard to public ownership of property; moving away from traditional structures of individual property ownerships in favour of shared co-location

arrangements where property sovereignty issues are less important to individual organisations than the overall benefit to the public.

A key part of partnership working is the sharing of capacity, where the authorities with larger resources are able to assist other authorities and keep skills and capability within the public sector.

## Schools estate

Education provision is integral to the development of communities and their economic wellbeing. Correspondingly, the development of a robust strategy for the schools estate, which underpins the delivery of appropriate standards of accommodation, is essential.

### Objectives:

To work together with the Schools Service and Planning to develop and deliver integrated Service and Asset Management Plans (AMP's) for the estate, which informs and provides medium term programmes and long term forecasts.

The Schools and Learning Service and Property Services are in the process of restructuring their departments and the objective is to develop a model, which drives asset and infrastructure planning through a carefully considered and planned process.

The outcomes will be to deliver:

- an Asset Management Plan for each local authority area
- a five-year schools programme and Medium Term Financial Plan; and
- a 15-year forecast to inform the county's, boroughs' and districts' infrastructure and resource planning.

## School places projections

**National and local perspective** - The national pupil projections are produced within the Department for Education (DfE) at a national level only. They are based on the latest national population projections from the Office for National Statistics (ONS) and clearly identify an increase in birth and upwards trend in the medium term.

These projections are reflected in the service's own local forecasts for the period, which have been validated by the recent release of statistics from the latest government population census.

## Children's, Schools and Families place planning protocols

Surrey is entering a phase of sustained pressure initially for primary school places and subsequently for secondary school places. The service wishes to develop a set of protocols that will help generate a more consistent approach to school place planning, provide schools with an opportunity to influence and shape proposals and provide a quicker and clearer route to decision-making.

Pupil place projections will be produced on a yearly basis by the School Commissioning team in February each year and published on the Surrey County Council website in April. The

School Organisation Plan (SOP) document summarises the county council's overall approach to school organisation and will respond to the projections on a borough and district basis and state any actions planned in future years to meet projected demand. This document will be updated and shared with all schools before being published on the county council's website in May each year. Projections will form the basis upon which officers talk to schools about place planning issues.

Property Services will play an integral part in assisting the service to develop their expansion strategy by providing asset management data to inform their decisions on the optimum sites, from a property estate perspective, that can be developed and working together as part of a multi-disciplinary team formed from the Service, Planning, Highways and Property to evaluate the options.

## Special Education Needs (SEN) Strategy

Following a reorganisation within the Schools and Learning Division the SEN strategy is to be refreshed to:

- enhance further the development of mainstream school capacity to meet the needs of a wider range of pupils
- inform the development of the county council's Medium Term Financial Plan (MTFP) for the period 2013-18.

### Objectives:

To meet the expected growth in the numbers of pupils with Statements of SEN and reduce the reliance on the non-maintained sector with the challenge of enhancing the offer within Surrey's own schools and centres to provide a further 300 places over the next five years. Property Services is working closely with the service to identify asset management plans and inform development of the service's options and strategies. The timescale for this review is to publish an agreed strategy by April 2013.

## Asset Management Plan (AMP)

Central to the service's strategy development is the formation of a robust asset management plan (AMP) for the schools estate with a 15 year horizon. This will be an essential development step in 2013 for driving value through the end to end Schools Place Planning process. The benefits of medium and long term planning are:

- development of land acquisition strategy in the public and private estate
- to assist boroughs and districts to develop their strategic asset and infrastructure plans
- to enable the county, borough and district councils to optimise their Section 106 and Community Infrastructure Levy returns
- to provide essential information to the Planning and Highways teams, enabling development of operational and resource plans.

## Building condition

The majority of the schools estate, some 90%, were built prior to 1980.

A new phased lifecycle cost survey will be undertaken for the schools estate in the 2013/15 period, matched to the services place planning forecasts. The surveys will be undertaken by the newly formed internal surveying team and surveys will be scheduled to match the schools and areas being considered for expansion.

This programme of surveys will provide an essential and accurate picture of the condition of the schools estate and inform the development of the asset management and maintenance investment plans for each area and school.

## Building solutions

The approach to the type of accommodation provision in the Schools Estate to address expansion needs is currently going through a progressive decision process, which follows on from the Service's early forecasts and meetings, where place pressures are identified or anticipated.

The process considers expansion through:

- 1) the use of existing assets through organisational changes by the school to make use of accommodation with minor or no adaptation requirement
- 2) adaptation of existing accommodation
- 3) extension or new build within the existing school
- 4) a new school on new or existing land within the county's estate.

During 2013 a team comprising Property Services, Procurement, Client and the newly formed Cluster Programme Office will review build solutions with the objective of driving value through the estate and optimising efficiencies in the delivery process. The review will cover all aspects of build, including temporary, modular and traditional approaches.



## Schools by category

A summary of the schools set out by category is below:

<p><b>Community Schools</b></p> <p>Community schools are run by the Local Authority which employs school staff (though staff are funded by the school), owns the land and buildings, and sets the admissions criteria that decide which children are eligible for a place.</p> <p>The school is responsible for recurrent repairs and maintenance and statutory inspections.</p> <p>The Local Authority is responsible for all capital maintenance work.</p>	<ul style="list-style-type: none"> <li>• Nursery schools (under 5s)</li> <li>• Infant (Reception – Year 2)</li> <li>• Junior schools (Years 3 - 6)</li> <li>• Primary schools (Reception – Year 6)</li> <li>• Secondary schools (11-16)</li> <li>• Secondary schools (11-18)</li> <li>• Special schools (Students with special educational needs due to severe learning difficulties)</li> </ul> <p><b>Total</b></p>	<p>4</p> <p>57</p> <p>28</p> <p>83</p> <p>9</p> <p>4</p> <p>23</p> <p><b>208</b></p>
<p><b>Foundation Schools</b></p> <p>Foundation schools are run by a governing body, which employs the staff and sets the admissions criteria. Land and buildings are owned by either the governing body or a charitable foundation.</p> <p>The governing body is responsible for all capital or maintenance works.</p>	<ul style="list-style-type: none"> <li>• Nursery schools (under 5s)</li> <li>• Infant (Reception – Year 2)</li> <li>• Junior schools (Years 3 - 6)</li> <li>• Primary schools (Reception – Year 6)</li> <li>• Secondary schools (11-16)</li> <li>• Secondary schools (11-18)</li> </ul> <p><b>Total</b></p>	<p>0</p> <p>4</p> <p>3</p> <p>10</p> <p>5</p> <p>4</p> <p><b>26</b></p>
<p><b>Voluntary Controlled Schools</b></p> <p>VC schools are generally religious or faith schools. They operate and are treated in the same way as community schools.</p>	<ul style="list-style-type: none"> <li>• Nursery schools (under 5s)</li> <li>• Infant (Reception – Year 2)</li> <li>• Junior schools (Years 3 - 6)</li> <li>• Primary schools (Reception – Year 6)</li> <li>• Secondary schools (11-16)</li> <li>• Secondary schools (11-18)</li> </ul> <p><b>Total</b></p>	<p>0</p> <p>9</p> <p>3</p> <p>14</p> <p>1</p> <p>0</p> <p><b>27</b></p>

<p><b>Voluntary Aided Schools</b></p> <p>The majority of voluntary-aided schools are religious or faith schools. In Surrey there are two schools that are voluntary aided in their own right. The governing body employs the staff and sets the admissions criteria. Buildings are owned by the Diocese/governing body but not always the land.</p> <p>The Local Authority is not responsible for any capital or maintenance works.</p> <p>The VA sector has its own capital programme – LCVAP (Locally Co-ordinated Voluntary Aided Programme)</p>	<ul style="list-style-type: none"> <li>• Nursery schools (under 5s)</li> <li>• Infant (Reception – Year 2)</li> <li>• Junior schools (Years 3 - 6)</li> <li>• Primary schools (Reception – Year 6)</li> <li>• Secondary schools (11-16)</li> <li>• Secondary schools (11-18)</li> </ul> <p><b>Total</b></p>	<p>0</p> <p>27</p> <p>12</p> <p>47</p> <p>0</p> <p>11</p> <p><b>97</b></p>
<p><b>Academies</b></p> <p>Academies are publicly funded, independently managed schools, which operate outside of local authority control. Academies have more freedom than other state schools over their finances, the curriculum, and teachers' pay and conditions.</p> <p>Land and buildings are transferred on a 125-year lease from the Local Authority.</p> <p>The Local Authority is not responsible for any capital or maintenance works. However, if an academy needs to expand because the Local Authority has asked it to take more pupils capital works may be funded by the local authority.</p>	<ul style="list-style-type: none"> <li>• Nursery schools (under 5s)</li> <li>• Infant (Reception – Year 2)</li> <li>• Junior schools (Years 3 - 6)</li> <li>• Primary schools (Reception – Year 6)</li> <li>• Secondary schools (11-16)</li> <li>• Secondary schools (11-18)</li> </ul> <p><b>Total</b></p>	<p>0</p> <p>0</p> <p>1</p> <p>3</p> <p>7</p> <p>12</p> <p><b>23</b></p>

## Non-schools estate

### Strategies for each service directorate

A high level overview of the strategies for each service directorate is set out below. This is not a static representation, rather one which will evolve as the strategic needs of the directorates adapt to the changing demands upon them.

Similar to the schools estate, the process of project reporting and control will be managed by the performance team and reported through the virtual teams that work with the service directorates.

### Role of Property Services in service strategies

Property Services works collaboratively with the service directorates to assess the short, medium and long term impacts on the council's assets and future asset needs. The benefit of this approach is that it enables:

- focused planned expenditure on maintenance of assets
- horizon planning of future service directorates' changing strategic needs
- enhanced 'one team' working with individual service directorates and associated stakeholders
- improved service and corporate outcomes, including combined asset 'market-enabling' opportunities that enable service delivery for more than just one service directorate/stakeholder.

To assist service directorates as their strategies evolve, Property Services provides supporting strategic advice to assist in the direction of travel and option setting of those emerging strategies which have property and asset implications.

### Service directorate strategies

#### Children's, Schools and Families

**Family support** - increased support for families with complex needs and significant social disadvantage. The aim will be to provide improved outcomes for children by supporting the whole family.

**Early help** - providing services as soon as possible to prevent negative issues from escalating.

**Disability services** - Surrey County Council, NHS Surrey and Surrey clinical commissioning groups are developing an integrated approach to services across health, social care and education for children with complex needs, ensuring that families access these services through a clear single gateway.

**Property Services** is working with the Children's Service to ensure the development of an overarching property strategy which fully supports the service in delivering their key service strategies.

In respect of Services for Young People (SYP), the three key strategies are:

- 1) Externalisation of youth work through the Centre Based Youth Work (CBYW) programme - 32 youth centres to be used more intensively at evenings and weekends for the delivery of CBYW, delivered in partnership with one of three appointed community sector organisations.

- 2) Skills Centres - This is a new youth provision that will operate from 20 youth centres in the daytime, targeting young people who are not in employment, education and training (NEET) and offer them a programme to build their skills and motivation to participate in education, employment and training and to avoid crime.

- 3) Youth Support Service (YSS) - This is a new integrated multi-agency strategy to increase participation in education, training and employment and to reduce the number of young people in the youth justice system. This will involve moving 120 YSS staff out of leased area offices and into youth centres.



In addition, SYP are planning to set up social enterprises to operate the three outdoor activity centres (Surrey Outdoor Learning Centres, or SOLD). Property Services is working with SYP to ensure a clear understanding of the property implications at an early stage of the process and to plan ongoing Property Services involvement as the proposals evolve.

#### Adult Social Care

The current strategy for day centres is to move away from isolated buildings into smaller more community-focused premises offering greater interaction with the public. The People with Learning Disability strategy is being reviewed following the recent Public Value Review and, in line with the commissioning strategy, options are being considered to expand supported living to offer more comprehensive respite facilities and support. Older people's homes are currently subject to an extensive review, in line with commissioning intentions, exploring a range of options including new build care homes and outsourcing, to deliver the future service.



### **Customers and Communities**

Cultural Services' mission is to enhance the quality of the life of Surrey's residents by providing its statutory service responsibilities efficiently and to deliver accessible, high quality, inspirational and enjoyable cultural and learning activities, and information for all people living in or visiting Surrey. Cultural Services provides highly visible frontline services, available to all the public and comprises of libraries, adult learning, surrey arts and registration of birth, deaths and marriages.

Surrey Fire and Rescue Services' (SFRS) aim is to make Surrey a safer place to live, work and do business. To do this and reduce the impact caused by fire and other emergencies, SFRS will focus more attention on education, prevention and support for our vulnerable residents, helping them to live safely in their homes. Consequently, the key to SFRS's success is a move from re-active to pro-active intervention, whilst still providing a first class emergency 999 service when required.

### **Environment and Infrastructure**

The Environment and Infrastructure Directorate's strategic direction includes maximisation of waste recycling opportunities, and focused investment planning of its road infrastructure and traffic management network. To support this strategic direction, working with partners, there is a supporting property programme of upgrading the county's waste recycling centres and transfer waste stations and smarter working review of its highway depots and associated property assets.

### **Public Health**

To have a place in every organisation at all levels evidence-led actions to effectively prevent ill-health and disability at source at all times.

### **Business Services**

To be a leading public service provider of innovative business solutions and transformational change.

### **Chief Executive's Office**

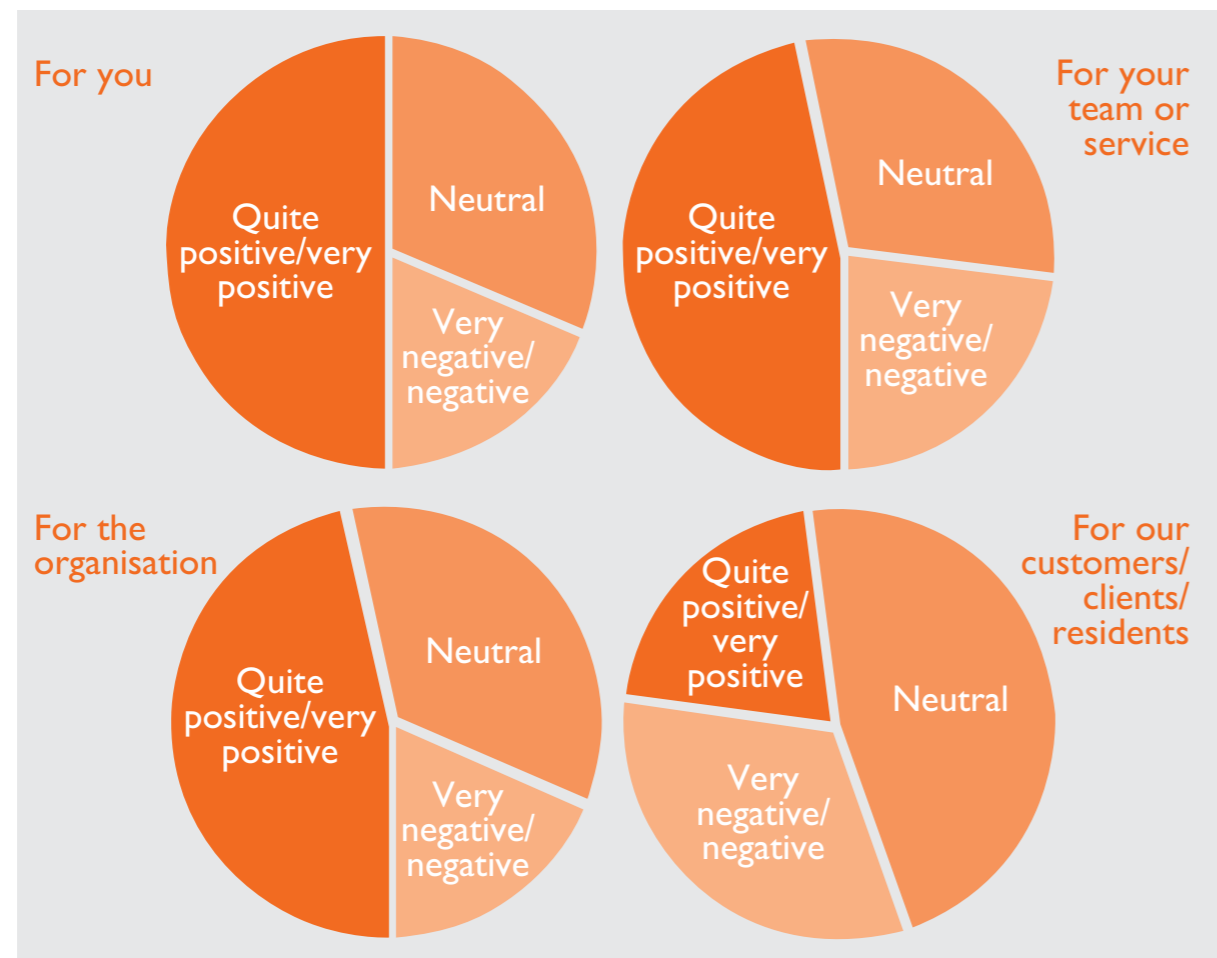
To have enabled and assisted Surrey to deliver the most effective and efficient services to residents.

## Office accommodation

The office accommodation strategy has developed from the Making a Difference programme. This strategy has evolved beyond the transformation agenda to look at how the office portfolio can be restructured to meet the developing needs of the services, executive and members over the course of the next 10 years and beyond.

### Making a Difference

The council's Making a Difference programme arose principally out of a need to improve the utilisation of our buildings, support staff to modernise how they work, using new technology, and drive revenue costs out of the council's administrative office portfolio. The business case delivers gross savings of £6.5m per annum and a net benefit over the period of 10 years, of £39m.



The programme provides modern office and meeting accommodation, creating a flexible working environment for staff. It was designed to support staff who will be working more efficiently and flexibly through the deployment of improved technology and a shift in culture.

Embedding best office utilisation practices, strengthening the use of technology, and changing the way we work will ensure that the council can improve its desk utilisation from 1:1 (1 desk per person) to 3:5 (3 desks per 5 people) by 2013/14. We plan to reduce this further by 2015/16 across the portfolio, whilst reflecting other opportunities to improve our office environment and meet the requirements of a more flexible workforce.

Surveys have been carried with staff to understand if the changes have had a positive or negative impact on the way that they work. The results in the diagram on the left show that over 50% of those surveyed felt that the programme had a positive effect.

Opportunities for further improvements to the office environment were identified where staff felt these would increase their productivity and the efficiency of the services they deliver. These included:

- changing office spaces to create different work zones that more reflected how staff work, eg quiet areas for report writing
- improving how we manage desks and room spaces
- facilitating the use of more local council accommodation for staff to work from
- more facilities for video/skype conferencing.

These developments would potentially provide further efficiencies for staff and cost savings for the council by reducing travel costs, facilitate an increased use of technology which is more commonly used by our residents, and create space for partnership working or income generation. Developing a response to these opportunities will form part of a reviewed business case that ensures that it delivers more benefits for the organisation and our residents.

### Plan with service directorates

Service directorates have considered their future accommodation needs. This has enabled Property Services to take a strategic view across the estate, and consider staff locations, customer insight and optimal configuration for the supporting offices.

### Next steps

This programme has defined new and evolving working practices, continuing to shape the office estate and the future needs of the council.

During the course of the 2013 financial year, Property Services will be concluding the following to inform the office accommodation strategy:

- 1) completing occupancy studies of the area office buildings
- 2) undertaking a study of the relationship between staff's home and work base
- 3) reviewing the outcome of discussions with services on their future accommodation needs
- 4) revalidating the number and location of permanent workstations across the county
- 5) reviewing the need, number and location of hotdesking opportunities across the county.

This will allow us to create a business case which draws together the elements set out above and connects up with the other services within Business Services to provide a supportive programme for the service directorates.

## Rural estate

### Overview

The rural estate currently extends to 1,223 hectares (3,022 acres) with approximately 100 tenants occupying a mixture of dairy farms, grassland farms, smallholdings (including horticultural units) and grazing, as well as cottages and rural businesses. At 31 March 2012 its capital value was about £44m. With a rent roll of almost £0.5m it produced a yield of 1.3%.

Property Services' priorities are "to optimise the financial, social and environmental returns from the rural estate, supporting and strengthening the rural economy through proactive management that promotes dynamic involvement with the local communities it serves".



These are underpinned by three objectives:

#### Objective 1 - optimising revenue and returns

- **Financial performance** – develop systems for, and a culture of strong financial management, including planning, monitoring and control, particularly in respect of maintenance and repairs
- **Estate Management Planning** – develop a rolling three to five year business action plan for the estate, reviewed annually
- **Management information** - improve the quality of estate management information through improved IT systems and a dedicated rural estate administration resource
- **New income streams** - promote an investment programme to develop new income streams into the estate
- **Release latent value** - adopt management strategies that release locked-in value from redundant or inactive farms and buildings

#### Objective 2 – supporting rural communities and businesses

- **Business partnering** - establish an investment programme that helps tenants develop their existing businesses and encourages diversification
- **External focus** - promote social and business co-operation and networking both within the estate and with external partners in the south east
- **Business planning** - provide tailored business training and advice through a series of seminars, workshops and one-to-one sessions
- **Apprenticeships** – link with agricultural and horticultural colleges to develop an on-going apprenticeship scheme on the estate
- **Local food and products** – establish a targeted business support programme (including funding) to support the production and marketing of local food and products (eg dairy products)

#### Objective 3 - supporting good environmental stewardship

- **Stewardship** - promote awareness and take-up of Entry Level and Higher Level Stewardship and other schemes
- **Environmental audit** – undertake a comprehensive audit across the estate to assess compliance with current legislation and identify those areas and assets requiring rectification.
- **Water** – support schemes which help minimize the use of water and production of dirty water and promote schemes for harvesting and storage of rainwater (eg off the roofs of farm buildings).
- **Energy** – support schemes to minimize use and develop on-farm renewable forms of energy production (eg photo-voltaics on the roofs of farm buildings). Assess estate potential for biomass production from existing woodlands and farms
- **Waste** – promote schemes which reduce waste and encourage re-use, recycling or responsible, compliant disposal



## Housing management

### Housing estate overview

The county council is not a housing authority and therefore does not have a statutory duty to provide housing within our area. We do however hold a portfolio of properties used for residential purposes, broadly categorised into 3 groups:

- **Tied housing** - property held for the occupation of county council-employed staff where this is a condition of their Contract of Employment. There are currently 175 tied houses with a rent of around £222,000 a year.
- **Private rented and vacant houses** - houses previously purchased and used as tied houses but subsequently declared surplus to operational requirements. We rent these on the open market where a return on investment can be demonstrated.
- **Gypsy sites** - we own 17 gypsy sites, of which two are held on long leases from the borough/district councils.

The properties forming the residential portfolio are located across the whole of the county. Unlike housing authorities where properties often form part of larger Registered Social Landlord estates or holdings, the properties in this portfolio are scattered.

### Management of property

Tied Housing Agreements are issued by Property Services as well as dealing with the relevant Notices to obtain vacant possession. The rent paid by a tenant is a percentage of salary with these monies paid into the relevant budget. The majority of tied houses sit within the schools portfolio. The budget holder is responsible for fulfilling the landlord obligations including repairs, servicing and compliance issues.

Private housing is managed directly by Property Services. A steady programme of refurbishment has commenced following years of under investment to enhance asset value in the event of a future sale and prolong the income streams and steady returns to the organisation. Properties are inspected annually and services are provided from within the department (responsive, planned, cyclical maintenance, annual checks etc).

The management of the 17 gypsy sites is split between the county council and borough councils, with the county council managing 14 sites. A programme of capital and revenue investment is underway to safeguard the occupiers, fulfil landlord obligations and ensure longevity of the sites. The medium term aim is to reduce running costs and to bring the portfolio into a net positive financial position over the next five years.

### Vacant Property Strategy

At any point in time the county council will own and manage a number of vacant properties, land and buildings, which are not in operational use or leased out to third parties. Property Services has a focused approach to managing these properties with a view to disposing, leasing or reusing as many assets as possible and aiming to keep vacancy rates to a minimum.

The revenue costs of holding vacant property are in the region of £500,000 a year in 2012. The top five most expensive properties account for about 48% of the expenditure. The most significant costs in holding vacant property are business rates or council tax, security (mobile security patrols) and building maintenance.

In managing vacant properties Property Services aims to:

- 1) have properties in vacant management for a minimal time prior to reuse, disposal or letting
- 2) tailor the management of a vacant property having regard to location, vulnerability, property type, future use, existing condition etc
- 3) ensure best value is obtained by sensibly procuring contracts
- 4) maximise income generating opportunities where possible and minimise liabilities.

### Vacant Property Strategy

A specification is developed from the outset as to how a property will be managed, involving a number of activities focusing on security, maintenance, compliance, utilities, taxation and inspections.

Within Property Services, the teams agree properties earmarked for disposal; those to be let to generate income; those to be reused by the council or partner organisations (services); and those properties incapable of sale / long term management. Consideration is in the context of backlog maintenance and projected costs, estimated market rental or disposal values, opportunities to enhance and investment schemes and the costs of holding property.

Performance on management of the portfolio is measured through cost (reduction of management costs) and income (achieved through disposal and re-letting). These form part of the overall departmental reports.

### Income strategy and investment portfolio

Acquisition of land or property is either planned, where a specific need has already been identified, or opportunistic where a property is offered for sale and the council can demonstrate a clear benefit in acquiring it.

For planned purchases, the council, within its budget, sets aside funding for projects in accordance with the Medium Term Financial Plan, termed the Capital Programme.

The council is under a statutory duty to provide schools and other facilities to enable the council's services to function effectively. Property Services actively supports the schools service and others in the acquisition of land and buildings, both at a strategic and individual project level throughout the county to meet the needs of the Capital Programme.

In both instances, the council is obliged to acquire land or property in accordance with the powers granted to it by statute.

### Powers to acquire

The council acquires land or buildings under both general and specific powers. General powers to acquire land or buildings come from the Local Government Act 1972, and more latterly, the Local Government Act 2000.

Under the 1972 Act, local authorities were empowered to acquire property to enable them to fulfil their functions, or for the benefit, improvement or development of their area

(irrespective of whether that land was required for an immediate purpose). The 2000 Act introduced the concept of 'wellbeing' powers, under which an authority could undertake anything which they could demonstrate was required to promote or improve the economic, social or environmental wellbeing of their area, and these powers included the ability to acquire land or buildings for such a purpose.

In addition to planned acquisitions, which are undertaken in accordance with the Capital Programme, the council has set aside separate capital funding to enable it to acquire land or property where no specific provision has been made within the Capital Programme.

We are still developing our investment strategy, which will focus on five key areas generally categorised as:

- ongoing service needs
- service innovation
- commercial income opportunities
- strategic land acquisitions
- waste infrastructure.

The primary purpose of the strategy is to produce both new and enhanced revenue streams to contribute to the service costs of the council and to facilitate economic development and regeneration of towns and other areas within Surrey.

Opportunities for strategic acquisition might include:

- land purchases adjoining existing assets
- purchase of sites that might be required for service needs in the future, in particular school sites
- assets that form part of an identified regeneration project
- assets within growth areas such as Local Enterprise Partnership (LEP) that could be the catalyst for further investment and growth.

## Disposals/transfer strategy

Historically it has been usual for the council to sell surplus assets as a result of changes in service provision. In light of the developing Investment and Income Strategy, a more rigorous approach is now undertaken to consider whether a property or land should be offered for sale. In particular, the following influencers will be considered when assessing a sale/ investment:

- value of property for disposal
- potential for and values of alternative uses
- risk and timeline involved
- access to funding and other resources
- control over delivery of outcome
- procurement issues.

## Statutory/regulatory requirements

Under Section 123 of the Local Government Act 1972 all local authorities are under a statutory requirement to achieve the best possible consideration obtainable on all disposals.

A disposal at less than a Section 123 (S123) value would require the Secretary of State's consent unless the local authority makes a decision in accordance with the General Consent Order 2003. In these circumstances a sale at below a S123 value would have to be in the economic, social or environmental wellbeing of the community it serves and the discount below the S123 value is less than £2M. Any decision using wellbeing powers has to be made by the Cabinet of the council and should clearly identify, and, if possible, quantify the financial benefits of using wellbeing powers.

Property Services' asset plan, along with the council's Capital Strategy:

- identifies potentially surplus properties, either through the process of identifying underperforming assets or as outcomes from strategic reviews of service provision
- identifies at least a five-year programme of assets for disposal in line with the county council's Medium Term Financial Plan (MTFP)
- Sets out the process and procedures by which a disposal programme is authorised and delivered.

## Means of disposal

Whilst there is no requirement (statutory or otherwise) to sell property assets by any particular method, it is usual for the council to openly market properties for sale by private treaty, informal or formal tender or by auction. In the event an off-market sale is entered into, eg in selling a parcel of land to an adjoining owner, a supporting business case including a valuation report from a qualified Chartered Surveyor is required.

The council owns an extensive and varied property portfolio and consequently has a strong interface with a number of adjoining owners, leading to estate management enquiries and requests for the council to enter into off-market sales to private individuals. Whilst the council is sensitive to the desires of adjoining owners, the county is under no obligation to respond positively to such requests, and each case is dealt with on its individual merits, taking into account the council's obligation to secure the best consideration obtainable.



## Community Asset Transfer

As part of the council's overall response to the Localism Act, we have adopted a formal 'Community Asset Transfer' policy, in order to give local voluntary and community organisations more opportunities to take ownership and control of vacant and underused buildings.

The need for a policy on asset transfers was brought into sharper focus by the significant spending cuts and reduced government funding for the council since 2010, emphasising the need for us to consider how we could deliver more cost effective and better services.

Asset ownership can provide a voluntary or community organisation with a sustainable, long-term local base, giving them the stability they need to grow and to provide more targeted and cost-effective services for their local residents.

As the need for targeted, more cost effective services delivered locally grows in line with continued reductions in central funding, so the importance of asset transfers to help achieve these objectives will increase.

## Risk management

Risk management is embedded throughout the procedures in Property Services and is an integral function in all that we do. Categories of risk are not just limited to health and safety, rather it is much more wide-ranging for aspects such as programme risk, delivery risk and financial risk.

The county council's risk management strategy is part of the council's Constitution and is managed from the corporate level down through all directorates and to departments. The strategy acknowledges that 'risk management is an integral part of good management practice and a key part of corporate governance'.

Within Property Services there is an over-arching risk register that is maintained and reported at directorate level with a corresponding management action plan put in place.

Specific areas of risk that Property Services is attending include:

- asbestos, where many of the council's premises have asbestos containing materials within them
- water risk (eg legionella)
- cyclical maintenance of plant and equipment
- statutory inspections, eg fixed wiring testing, lift inspections, gas inspections
- fire risk assessment
- Equalities Act (eg access risk).

Insurance for the council is managed by Risk Management within Legal Services. The council self-insures up to £100,000. The council requires its consultants and contractors to hold appropriate insurance for the works being procured in line with the standard form of building contract in use for each project. The consultants and contractors are required to evidence this insurance and all works are insured in joint names. The level of insurance cover required is generally £10m.

## Emergency planning and business continuity

Property Services is defined as one of the council's critical services for Emergency Planning and Business Continuity purposes. This is primarily in relation to some of its core operational support functions that it provides to other services through a combination of in-house teams and external term contractors. Most importantly these are:

- the 24 hour Property Help Desk and Compliance Team
- opening and keeping operational County Hall and the network of key county offices
- reviews with services' Building Recovery Plans for key county offices.

Property Services has developed, and keeps under review, a Business Continuity Plan and works with its key contractors to plan for a range of scenarios from planned events (eg Olympics) to seasonal concerns (eg snow or flu pandemic).

Property Services also needs to work closely in the future with the corporate Emergency Planning Team and critical front line services to understand better their expectations and our ability to support their business continuity and emergency plans within the wider operational portfolio, including health and safety policy.



## Procurement

The council established a central strategic procurement function in 2007 and over the last four years we have developed a strategic and proactive team of professionals that are responsible for managing the council's annual external spend.

Our vision is to become a centre of excellence in commercial procurement through:

- providing professional sourcing to deliver the best commercial solution
- offering powerful insight into markets and suppliers throughout the life of our contracts
- to be a leading procurement team in the public sector.

Further detail on how we plan to do this can be found in our published strategy (2012-17).

### What does this mean for Property Services?

- Professional sourcing means the implementation of a programme approach (the grouping of projects) to all our construction related projects. This will drive efficiencies throughout the supply chain. It also means ensuring the appropriate procurement routes are in place to support the strategy.
- Powerful Insight means building detailed supply chain knowledge to understand the opportunities for standardisation and rationalisation.
- Becoming a leading procurement team means leveraging our property spend, by collaborating with other authorities (as part of a cluster).

The procurement team works closely with Property Services to agree priorities that align with the needs of the service directorates.

### The programme approach

The bundling of our construction related projects into large tranches of work will provide a number of key benefits:

- a) Contractors will be able to plan and sequence works over a longer period thus avoiding peaks and troughs of sub-contractor and supplier workload. Smoother workflows will allow for consistent resourcing and thus lower administrative and management costs throughout the supply chain.
- b) By grouping projects geographically volume discounts can be achieved. Again, this will apply across the supply chain.
- c) The standardisation of materials and components will bring efficiencies and discounts as higher volumes of work are routed to individual sub-contractors.
- d) Relationships with a smaller number of contractors can be developed and the benefits of early involvement realised.

## Collaboration

The council entered into a collaborative arrangement with Hampshire County Council and Reading Borough Council for the Education Basic Needs (EBN) requirements with the prospect of this extending into a larger cluster over time as well as increasing the scope of activity.

A cost savings strategy is being implemented by using common approaches to design and standardisation of specification where appropriate. Savings for the first tranche through reduced professional time and common specifications have amounting to around £1.65m so far. As the programme approach is developed and lessons learnt are captured for future phases, the cost reductions will increase.

The aggregation of requirements at this level will lead to further cost reductions. The sharing of resources (and learning) will deliver additional efficiencies.

## Procurement routes

The procurements routes adopted depend upon the spend category and size:

Low value projects across all categories will be tendered directly to a panel of local suppliers who are best placed to deliver such work directly.

Medium and higher value projects will primarily be procured through frameworks via mini-competition to ensure value for money is attained. A number of such frameworks exist, split into specialisms and, where appropriate, by value. This ensures the most appropriate supply base is competing for the council's requirements.

The immediate strategic focus is on our construction related activities.

However, a review will commence in 2013 to define the long term objectives across the soft facilities management category and the recommended appropriate future procurement strategy to realise these.

## What are our key goals and measures of success?

Goal	Benefit measure
Collaborative procurement of bundled basic needs projects through competitive frameworks	8% upfront procurement savings against original benchmarked cost plans
Early supply chain involvement and rationalisation for these projects. Alongside standardised designs/ materials	Additional 9% supply chain savings against original benchmarked cost plans
Engagement of local supply base directly on low value projects and at sub-contractor level on larger projects.	70% of annual construction related expenditure to be routed through local suppliers

## Maintenance

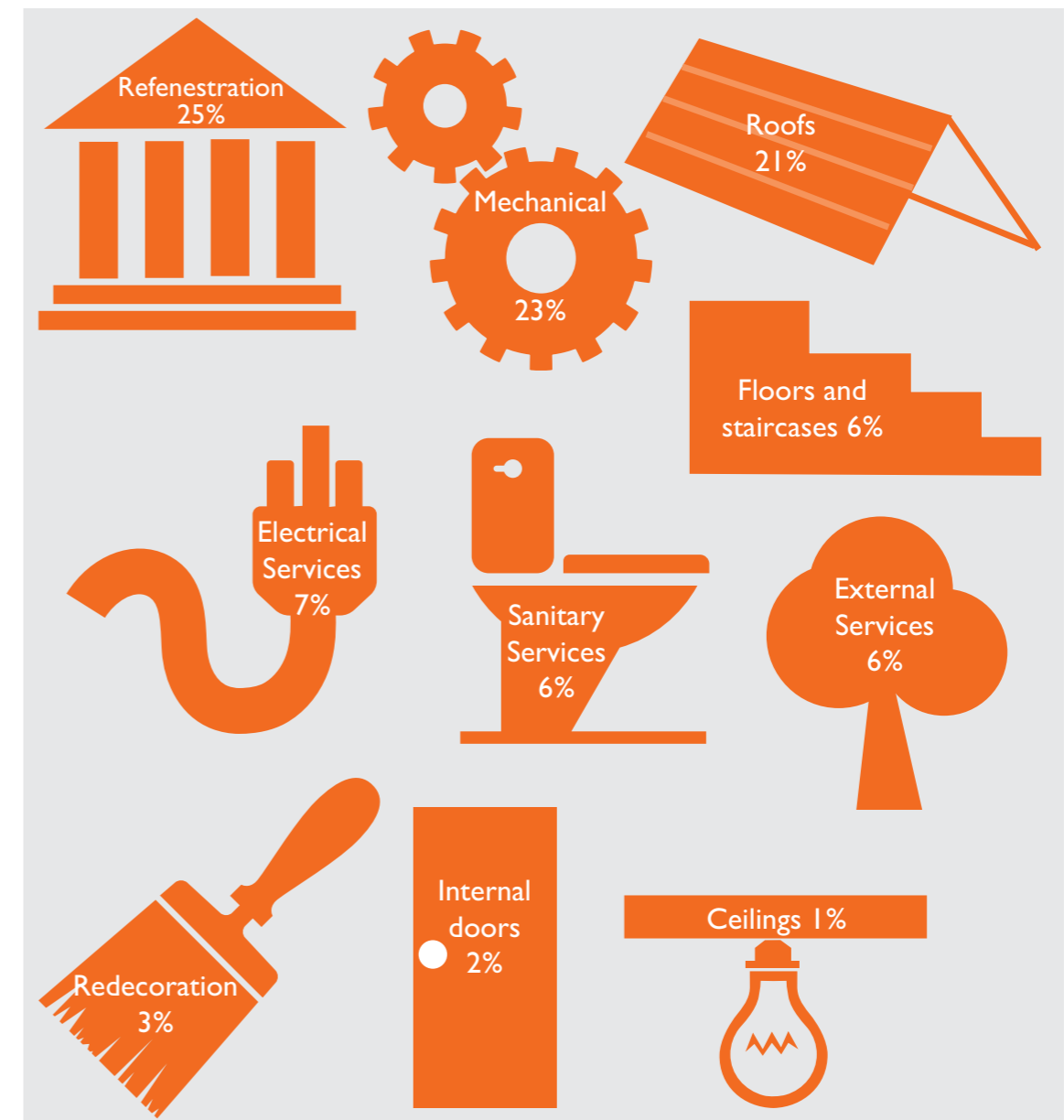
Property Services is responsible for maintaining the council's buildings and their plant and equipment effectively, efficiently and economically:

- to a standard which ensures that the condition of all buildings does not hinder use or provision of services
- to comply with legal requirements
- to maintain the value of the council's property.

We work within the framework of the council's strategies and corporate and service department targets to improve our performance terms of maintenance management. The delivery of the above is founded on the following principles:

## Backlog maintenance

The backlog repair liability of the estate is estimated to be around £105m, £80m of which is the schools estate and £25m the non-schools estate, covering a variety of areas. Property Services is undertaking an exercise to validate this figure, expected to be complete during 2013.



One of the key issues is the management of the maintenance backlog and the ability to reduce it with a limited budget. It is our aim to provide a maintenance service that is proactive but still provides the capability to be reactive when the need arises. This approach will provide better value for money and increase customer satisfaction

Building performance data sets provide the platform to direct available funds to areas of greatest need by reference to the following:

- asset schedule, reflecting both future services plans and strategic opportunities
- energy usage to pinpoint poor performing assets and buildings
- analysis of trends for responsive calls to “hot spot” properties within the portfolio
- condition surveys.

We are preparing and will maintain a rolling 5-year planned maintenance programme that will incorporate 25 year life cycle costing and the council’s Carbon Reduction Commitment agenda and service strategies

The formulation of programmes will prioritise works to meet statutory obligations, improve efficiency and minimize the risks of health and safety, building closure and any impact on service delivery.

## Maintenance regimes

The council makes use of the following maintenance regimes:

- **Cyclical maintenance** – this is the servicing and inspection of plant and equipment, its purpose to meet our statutory requirements and as asset protection
- **Responsive Maintenance** – low value day to day repairs in order to maintain an asset or comply with health and safety legislation
- **Planned Maintenance** – higher value repairs in order to maintain an asset or remedy a breach of health and safety legislation.

## Best value procurement

Following the re-procurement of contracts, new maintenance arrangements will be in place from 2012 that will reshape how this is delivered for the council. This includes:

- responsive and Cyclical Maintenance provided by two five-year term contracts, which covers works up to the value of £7,500
- establishing a Surrey Local Contractor Panel, which will generally cover works in the range of £7,501 to £75,000
- putting in place specialist contractor frameworks for programmes/projects works with contract values in the range of £75,000 to £500,000.

Key to this will be developing strategic relationships with suppliers driving faster development, more accurate costing, reduced defects and ultimately lower cost.

## Performance management

Detailed performance indicators are used to cover the range of services delivered. These provide a benchmark for measuring current service delivery and feedback on issues highlighting areas and priorities for improvement. Satisfaction surveys are undertaken to gather data on the perception of the service received by end-users and key stakeholders.



## Effective communications

We recognise the need to reflect client and stakeholder needs in the provision of the maintenance service. As part of Property Services’ wider engagement and customer services model, maintenance staff will form part of the virtual teams.

A web based Property Asset Management system will allow service directorates to view and track maintenance activities.

## Property Maintenance Buyback agreement with schools

Property Services has an arrangement for schools to purchase building maintenance services via the Buyback agreement. Schools pass a proportion of their central revenue funding back to the council and then receive services under a service level agreement

The scheme is arranged into two parts; Buyback Works and Buyback Inspections.

- **Buyback Works** operates as an insurance scheme whereby the subscriptions are held by Property Services and responsive repairs are carried out from the pool of monies.
- **Buyback Inspections** is where Property Services offer a basket of services which schools can buyback any number of (eg boiler servicing, 5 year fixed wiring, fire alarm servicing, display energy certificates (DECs) etc). Inspections are also open to Academies.

Presently up to 75% of schools buyback a service of some kind. A new Buyback Scheme launched in April 2013 when the current scheme expires. Property Services is currently working with school representatives to develop the scheme.

## Facilities management

The facilities team plays a significant role in providing the operational aspects of Property Services. It represents the service's 'first-line' contact with building users; understands the needs of occupying services and is the conduit into the wider delivery side of the service including delivery of soft facilities management contracts; and plays a key part in allowing Property to deliver an effective customer service.

Facilities Management is responsible for the day-to-day management of the corporate portfolio of non-school premises. Property Services operates two approaches to facilities management:

- Fully Serviced Accommodation (FSA)
- Integrated Facilities Management (IFM).

### Fully serviced accommodation

The fully serviced accommodation approach ensures that the council's office workspace delivers a working environment that meets the needs of our staff, members and public visitors and is 'fit for the future'. FSA is a long-established and well regarded service and its vision is to provide a full facilities service (from 'paper clip to big ticket maintenance'). Delivery of FSA services at all key county offices means a full range of both 'hard' and 'soft' day-to-day FM services at a relatively small number of sites. These include statutory services (building compliance and business continuity); protecting the asset (maintenance and servicing) as well as providing a raft of contractual and 'soft' services to building users (cleaning, post, car park management, reception, etc) that give added value and take away the burden of day to day building management from front line teams to allow them to concentrate on their core business of delivering services to the people of Surrey.

FSA is delivered at 5 key county offices:

- Corporate HQ, County Hall, Kingston
- Consort House, Redhill
- Fairmount House, Leatherhead
- Quadrant Court, Woking
- Runnymede Centre, Chertsey.

Support is also provided to the primary and secondary data centre operations and a small number of satellite local offices, mainly located in partner premises at district councils. FSA service provision needs to be aligned to the office accommodation strategy. It needs to continue to deliver excellent customer service, provide quality office accommodation and adapt to support a more agile working environment.

## Integrated facilities management

Property Services take responsibility for day to day property management issues throughout key services across over 240 non school sites across 11 districts. The IFM service is not staffed to provide a physical FM presence at each site and its primary focus as a result is on compliance and building management issues. All of the following buildings receive the benefit of the IFM service, with the numbers of buildings shown in (brackets):

- libraries including Surrey Arts (57)
- fire stations (24)
- youth centres (38)
- adult education centres (8)
- heritage Centre (1)
- children's residential homes (9)
- adult residential homes (6)
- adults day and resource centres (18)
- short stay schools (11)
- highway depots (9)
- vacant properties (100)
- people with learning disabilities residential homes (5)
- family centres (4).

There are three main ways which the IFM service is looking to develop its service:

- **Development of its compliance role**  
Its current role to complete annual fire risk assessment which is a statutory requirements means it is well placed to expand this compliance service. Areas which have recently been identified are general health and safety and building inspections, access audits and building security risk assessments. By working closely with key services at sites these compliance areas can be developed to ensure a consistent use of the agreed approach and as such, ensure that the council's buildings across all portfolios are compliant with statutory compliance requirements and that they are safe places to work and visit.
- **Extending the scope of the building management role**  
One area where IFM needs to develop a more structured approach is in the area of inspection programmes in the vacant property portfolio (such as vacant housing), in addition to undertaking our duty as Corporate Landlord, fulfilling our obligation of on-going inspection regimes at our contracted out sites, particularly with regards to Homes

for the Elderly. Three recent pilot inspections at Homes have been conducted and initial feedback has been very positive.

One area IFM wishes to explore further is to review the offer of conducting fire risk assessments within the schools sector. With a number of Surrey schools now electing to turn Academy the IFM offer has to develop to continue to support these schools and those who remain.

- **Working on implementation of Property Operational Plans**

These plans offer a huge challenge for the IFM service as they will need to be conducted per building per service and are there to identify opportunities to generate efficiencies, allowing us to target limited resources to improve the overall corporate performance of each site and hopefully, through all these areas, provide a much better service to the customers and users of each site.

## Helpdesk

### Rationale and vision

The helpdesk was reintroduced into council in April 2010. It is the focal point for all building users to log responsive service calls. The helpdesk is committed to providing the highest levels of customer service whilst being sensitive to the individual customer operating needs and meeting the set priority response times. This strong commitment to high quality and timely response will allow our customers to have a safe, useable environment which will allow them to concentrate on their core business.

Much has been achieved over the last two years including much tighter control of the responsive budget, greater collaboration between technical and professional staff with the benefit that accurate data can be fed into the cyclical and planned maintenance regimes. In addition analysing the types of calls received and working closely with the term contractors, the helpdesk has been able to identify "building hot spots" and so target responsive and planned maintenance in an improved way.

### Scope

Last year the helpdesk received 18,000 calls for responsive work in addition to 6,500 emails for non urgent requests for work. The helpdesk has consistently received high customer satisfaction ratings averaging 74.2% for 2011. The helpdesk provides a 24 hour a day, seven day a week 365 day per year service. The current priority rating for jobs into the helpdesk rate from a level 1 (urgent and severe hazard to health ) through to a level 4 (non urgent remedy to defects)

## Developments

Property Services along with key services is reviewing the scope of what the helpdesk can offer and how this offer is made. There are six main ways which the helpdesk is looking to develop its services over the next two years:

- better data capture through the new Property and Asset Management (PAMs) system
- reducing the average speed of answer and developing ways to increase self service and reduce avoidable contact
- building relationships with building users and increasing the services' reputation
- trialling of instant messaging as a new contact method
- creating Twitter accounts to broadcast key messages or updates to reduce avoidable contact
- forging closer links with My Helpdesk to develop a joint approach and shared practice
- developing an overarching customer standard and KPI's.

### Extending the role of the Property Helpdesk function

Work is underway to extend the scope of the helpdesk and transform it from a responsive maintenance helpdesk to an all encompassing Property Helpdesk. This will enhance the flexibility of the Helpdesk function and enable it to become a one stop shop of customer queries. This should lead to greater flexibility and address the requirement for increased customer service and contact.



# Action plan and implementation

In preparing this strategic asset management plan, we have not only focused on the work currently being undertaken by the council but have given some real thought to the actions that will improve the Property Service. By aligning these with the corporate strategy, it is possible to make the connection between the actions identified and how these support the council's priorities, which in turn benefit the residents of Surrey.

The actions range from development of policy areas through to some very specific tasks, all of which the management team agree are instrumental in improving the service delivered. These actions will be tracked through management reporting processes and will be reported to members on an annual basis.

## Action 1

**Link with corporate strategy:** Quality

**Outcome:** strong financial management and accountability

**Measure:** central finance monitoring and internal audit checks on process

**Timeline:** Q4 2013

## Action 2

**Link with corporate strategy:** Value

**Outcome:** dynamic Property Services with the ability to invest in new portfolios to drive greater value for the authority

**Measure:** clear policy and strategy with demonstrable value delivered

**Timeline:** Q2 2013

## Action 3

**Link with corporate strategy:** Residents

**Outcome:** closer working with services to provide a better delivery

**Measure:** positive customer/service feedback from directorates

**Timeline:** Q3 2013

## Action 4

**Link with corporate strategy:** People

**Outcome:** highly competent workforce who feel supported and motivated to move forward with us

**Measure:** positive feedback via annual staff survey and staff numbers who attained additional professional skills

**Timeline:** Q3 2013

## Action 5

Link with corporate strategy: Quality

- Outcome:** Property Services working from a single repository of high quality data enabling a slicker and more informed service
- Measure:** delivery of the system to budget, time, quality and its use across Property Services
- Timeline:** Q3 2013

## Action 6

Link with corporate strategy: Stewardship

- Outcome:** becoming a more energy efficient authority and raising the profile of energy management across the County
- Measure:** paper summarising research in this area, performance against like organisations and new innovations and next steps
- Timeline:** Q4 2013

## Action 7

Link with corporate strategy: Quality

- Outcome:** more effective management of large capital projects and their successful delivery
- Measure:** agreed process internally and with Hampshire County Council through the cluster programme office
- Timeline:** Q3 2013

## Action 8

Link with corporate strategy: People

- Outcome:** an enthused body of staff who understand why change is important and continuous for our service into the future
- Measure:** greater throughput of cases/projects in Delivery Teams/Project Teams
- Timeline:** Q1 2014

## Action 9

Link with corporate strategy: Policy

- Outcome:** plans which are seen as living documents, moving and changing as we change
- Measure:** scheduled review points going forward and strong management through a dedicated Risk and Business Continuity Officer post
- Timeline:** Q1 2013

## Action 10

Link with corporate strategy: Quality

- Outcome:** effective and clear reporting from Property Services providing at-a-glance visual management of key areas
- Measure:** new dashboard in place and proving effective
- Timeline:** Q3 2013

## Action 11

Link with corporate strategy: Partnerships

- Outcome:** a shared vision across Surrey and best use of what we (and our partners) hold in terms of property
- Measure:** creation of a single register
- Timeline:** Q3 2014

## Action 12

Link with corporate strategy: Residents

- Outcome:** consistent and clear communications with our customers, both internally and externally
- Measure:** positive feedback for Property Services in the staff and partner survey for this element
- Timeline:** Q2 2013

## Action 13

Link with corporate strategy: Policy

- Outcome:** understanding of what corporate landlord means across the whole organisation
- Measure:** service areas incorporating the vision of corporate landlord into their own service strategies going forward
- Timeline:** Q3 2014

## Action 14

Link with corporate strategy: Partnerships

- Outcome:** clear position for the authority with regards to what the Localism Act means for assets
- Measure:** a policy and guidance for officers to refer to
- Timeline:** Q3 2013

## Action 15

Link with corporate strategy: Partnerships

**Outcome:** more joint projects with other local authorities, sharing both expertise and capacity

**Measure:** shared outcomes, goals and costs, exemplar projects like PAMS with Hampshire County Council

**Timeline:** Q3 2014

## Action 16

Link with corporate strategy: Partnerships

**Outcome:** a more joined up approach for Surrey using innovative new vehicles to drive change

**Measure:** partner working across more areas of council provision

**Timeline:** Q4 2014

## Action 17

Link with corporate strategy: Stewardship

**Outcome:** a clear approach to management of the rural estate and increased benefits overall

**Measure:** more opportunities around start-up rural opportunities and diversification and greater commercial return

**Timeline:** Q4 2013

## Action 18

Link with corporate strategy: Value

**Outcome:** clear spend profiled over the medium term enabling more of a life-cycle view

**Measure:** a plan in place to show planned maintenance activities against reactive maintenance activity

**Timeline:** Q2 2013

## Action 19

Link with corporate strategy: Value

**Outcome:** a more varied menu of options that schools can buy-into from a property perspective

**Measure:** this flexibility being available, the reaction of schools measured through schools survey and the uptake of these services in the future

**Timeline:** Q3 2014

## Action 20

Link with corporate strategy: Residents

**Outcome:** a one-stop shop for fast and effective contact into Property Services

**Measure:** customer feedback and time taken to log and resolve issues and concerns

**Timeline:** Q2 2014

# Supporting pillars

## Performance management

### The performance management framework

Property Services is developing a framework to ensure performance is consistently monitored across all areas of the service using a series of tools that will indicate success. The framework will be informed by, and will work in parallel with the Property Improvement Plan, which has been developed based on past performance and changing service delivery requirements.

### Key Performance Indicators (KPIs) and targets

KPIs are measures of performance associated with all business areas in Property Services. These measures form a core component of management reporting through the directorate and on to members, for example energy performance and partnership projects.

KPIs are categorised into three main areas: currently, KPI reporting to members is limited to energy and the number of active partnership projects. Going forward, a selection of high level KPIs from the three areas below need to be collated for members.

- 1) Property Asset Performance
- 2) Supplier Contract Performance
- 3) In-house Property Service Performance.

Property Asset Performance is monitored at individual asset level, service portfolio level (eg libraries) or overall operational portfolio level.

There are five key areas of asset performance that are monitored. These are:

- 1) Operational Costs (excluding maintenance) £/m<sup>2</sup> (Gross Internal Area – GIA)
- 2) Maintenance Costs £/m<sup>2</sup> GIA
- 3) Maintenance Backlog £/m<sup>2</sup>
- 4) Energy Consumption £/kwh
- 5) Building Suitability (Service Perspective).

The cost per metre squared is based on the running cost of the building divided by the gross internal area of the building. The running costs are from the corporate financial system, SAP, and breakdown between types of spend is based on general ledger (GL) codes recorded against the expenditure.

The median figure for the council's portfolio is calculated based on the overall cost recorded against all the properties in the chart. The CIPFA median is taken from CIPFA cost figures from 12 other county councils and therefore gives a good indication of how the Surrey County Council's property assets are performing against other similar organisations.

Supplier Contract Performance is measured through a series of KPIs linked to the type of service being delivered. The achievement of appropriate KPI's demonstrates efficiency in the completion of individual tasks and management of the contract as a whole for the benefit of the county council. The contractor's performance is based on individual key performance indicators against specific targets.

KPIs are reviewed on a regular basis agreed with the suppliers. Reports are produced showing actual performance against targets and are often the responsibility of the supplier to produce, with the council carrying out an auditing/checking role. Future opportunities for contractors is based on performance measure through the KPIs.

In-house Property Service Performance is measured through a series of KPIs linked to the Property Services business area. KPIs are reviewed on a regular basis agreed with the Chief Property Officer and Performance Manager. Reports are produced showing actual performance against targets. In addition to these quantitative measures, Property Services aims to develop external relationships to assess overall performance against market leaders in the property field. A central government benchmarking tool is also used annually to assess the performance of the department across areas such as policy development and customer relationship. Building in these more qualitative measures enables us to have a balanced view of overall performance.

Customer feedback through surveys is also analysed to determine satisfaction with the service provided by in-house teams and external providers.

## Benchmarking

Many KPIs are established locally for Property Services but some are nationally recognised which enables benchmarking with other comparable public sector organisations.

The National Property Performance Management Initiative (NaPPMI) performance indicators are now accepted as 'industry standard' for asset management in both England and Wales and are further recommended by the Department of Communities and Local Government.

Property Services subscribes to the CIPFA Benchmarking club which enables NaPPMI indicators to be reported and compared with other public sector members.



## Financial management

### Background and structure

The Property Finance function is part of the Performance Team in Property Services. The transactional tasks are carried out by the Business Support team which are structured to ensure an efficient service is provided to the Property teams.

The Corporate Finance team works closely with the Property Finance team and provides professional financial information, analysis, advice and support, produces all external financial reporting on county council activities and lead on the council's annual budget setting and in year monitoring arrangements. The finance team also set the financial framework for the council, covering the regulations, instructions and guidance on all financial activities.

The challenge for the Property Finance team is to continue to develop and implement a range of tools and processes to support and improve overall budget and financial control in line with the recommendations provided by the Property Improvement Plan.

Property Financial and Budgetary Management - Financial Systems, Reporting and Budget setting

The council's main financial system is the corporate SAP system. Specific modules for SAP are in place to manage both the revenue and capital budgets, which are being supplemented by the addition of dashboard reporting as part of the wider management reporting process.

### Revenue

Property budget holders manage their revenue budget reports on a monthly cycle in conjunction with the Finance Control Manager, where any variances are discussed and management actions identified to ensure it is covered in the monthly reporting. The Senior Management Team receives a consolidated monthly report for review. A final report is submitted by the Finance Control Manager with all appropriate comments to Corporate Finance for consolidation, including a summary of the capital position below.

### Capital

Property holds and manages a significant part of the overall county council's capital budget, typically around £93m. New systems have been implemented to improve the management of capital budgets, which are part of a wider improvement programme of the financial reporting systems. A risk-based approach to managing budgets is being adopted by Property Services.

### Budget setting

The Medium Term Financial Plan (MTFP) is the "budget book" and forms part of the county council's corporate planning processes. The purpose of the MTFP is to provide a comprehensive review of the council's overall financial position for the current year and an overview of the prospects for the following four years.

Property Services bases its annual budget setting on the detailed budgets agreed in the MTFP and uses this information to assign appropriate budget amounts to the various headings they are responsible for. The budget setting process is a joint effort between Corporate Finance and Property Finance where the latter is responsible for providing agreed amounts and guidelines for the Financial Year

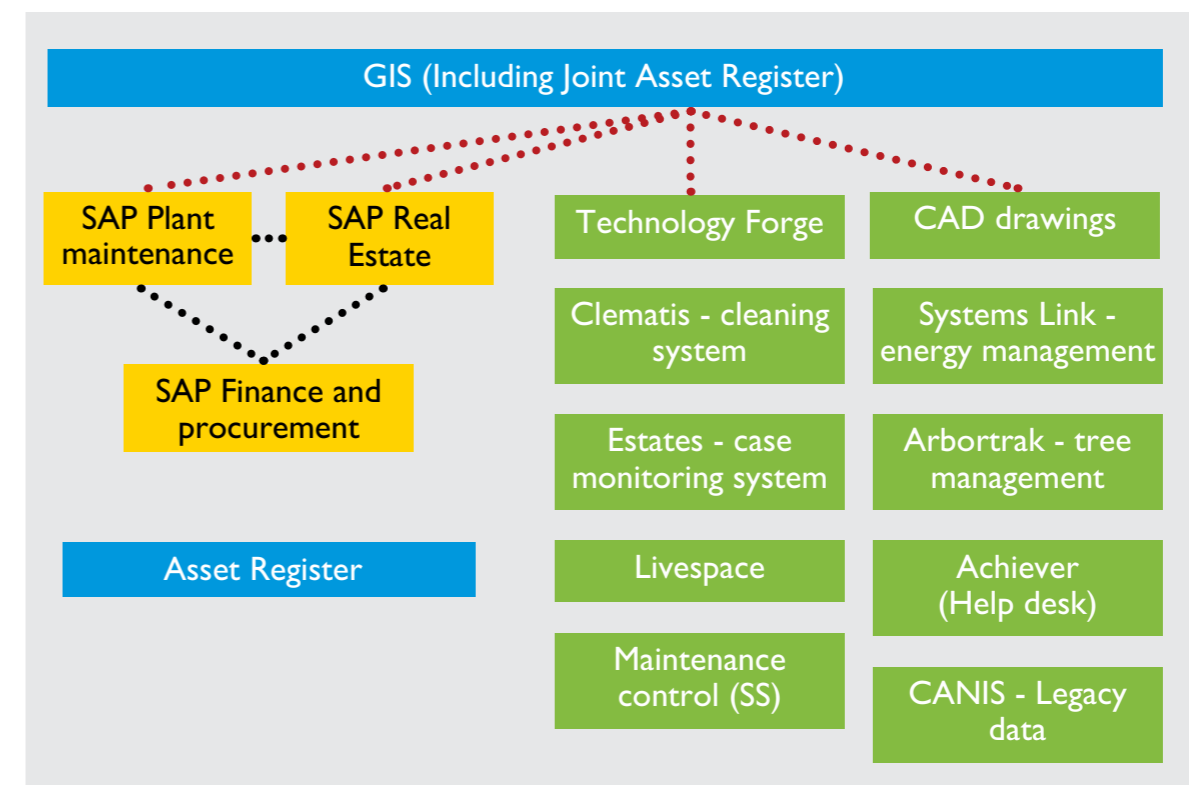
### Challenges and looking forward

The key messages to the property budget holders are to take ownership of their budgets, manage, control and report efficiently as well as ensuring that management actions are set, agreed and acted upon in order to meet the overall financial targets for the council. This process will be supported by the senior management team and appropriate training provided by Finance to provide budget holders with the right tools to deliver.

### Data management

Property data is recognised as a key tool in driving value from the county council's property assets. It is used for the day to day management of assets, measuring their performance, and providing information to support asset strategy.

The following diagram shows property systems at November 2012:



The GIS (Geographic Information System) holds a graphical representation of land and buildings owned by the county council. It also holds limited information on property owned and leased by public sector partners in Surrey.

The yellow boxes show the corporate SAP system used to record all county council property interests, manage building projects, and record collection and payment of rent and business rates.

The Asset Register is a standalone summary of information held in SAP.

The green boxes show the standalone systems that are needed to manage property business that are not supported by the corporate SAP system.

Due to the number of gaps in corporate system functionality, limited integration between systems and difficulty in sharing information with partners, the county council initiated the joint procurement of a new Property Asset Management System (PAMS) with Hampshire County Council. It will provide the functionality for managing assets through the whole property lifecycle, from acquisition to disposal.

A framework contract was set up naming in excess of 50 other public sector organisations in the south east, including the South East 7 group, who could “call-off” the contract. This will promote the sharing of information between organisations in the public sector and support the county council’s strategy and government policy for partnership working across the public sector.

PAMS is defined as:

“A fully integrated property information system that will facilitate partnership working, bringing together property asset data, financial information, maps, spatial information from CAD plans, and document management.”

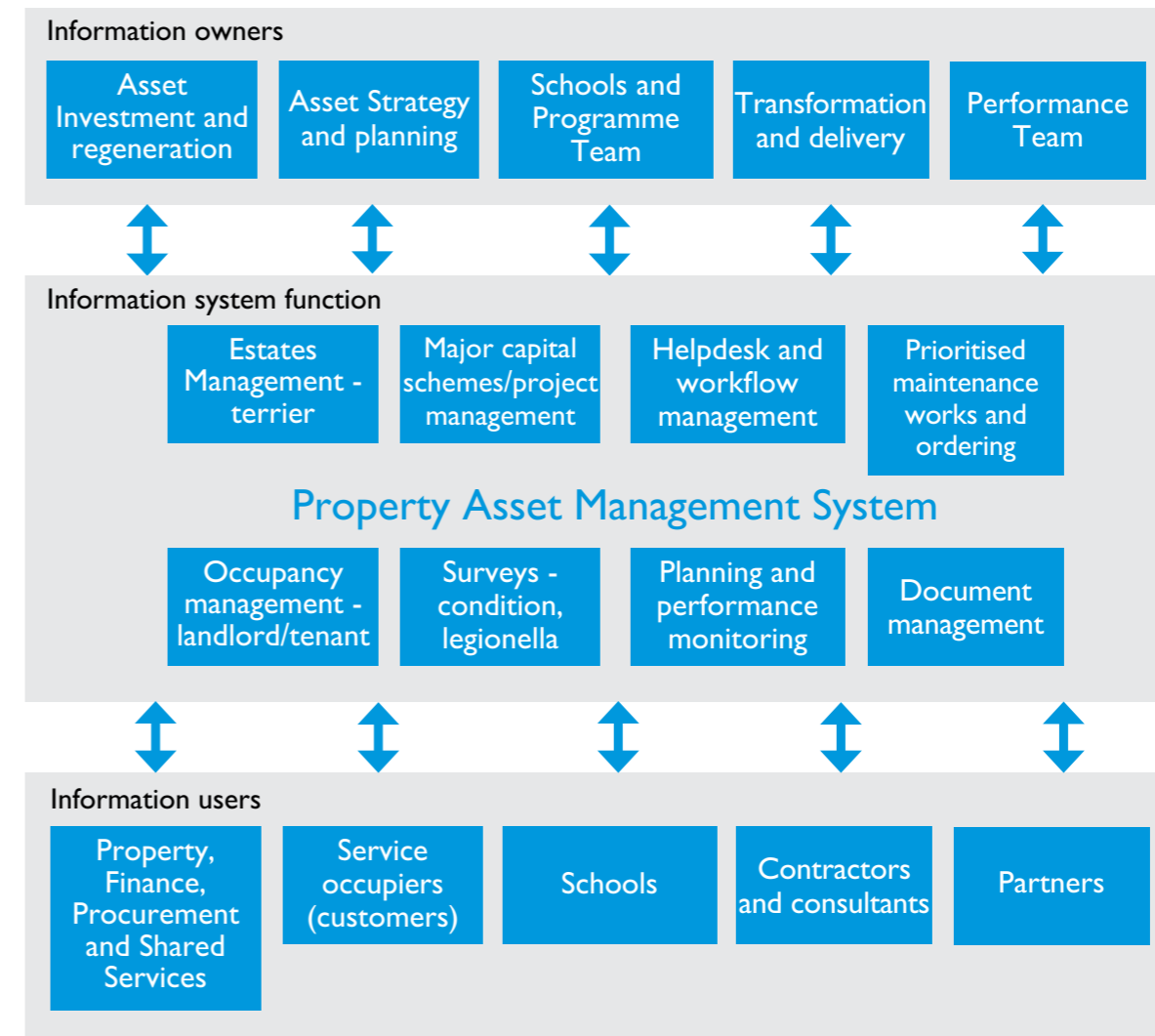
PAMS will also incorporate procurement and financial management processes and functionality. This will enable the county council to have systems in place that are fit for the management and delivery of Property Services and are ready for partnering with other public sector bodies.

Consultants and contractors employed by the council will be encouraged to use the PAMS in the delivery of any service commissioned, helping improve the quality and integrity of the management information on the system and give a holistic view of property assets.

Some of the Key Benefits of PAMS are as follows:

- a single source of accurate property information with potential for shared use of property data with partners
- cash benefits from lower system maintenance costs, smarter procurement, process efficiencies
- more efficient customer call handling (reactive maintenance) and access to information by customers and contractors
- improved project and budget management
- better assessment of property performance to support asset management planning
- improved space management and tracking of vacant space
- wider access to property information across the council, including schools, and externally, with partners, consultants and contractors
- greater integration with Geographic Information System (GIS)
- more efficient collection of asset condition data
- reduction in the need for spreadsheets with locally held data.

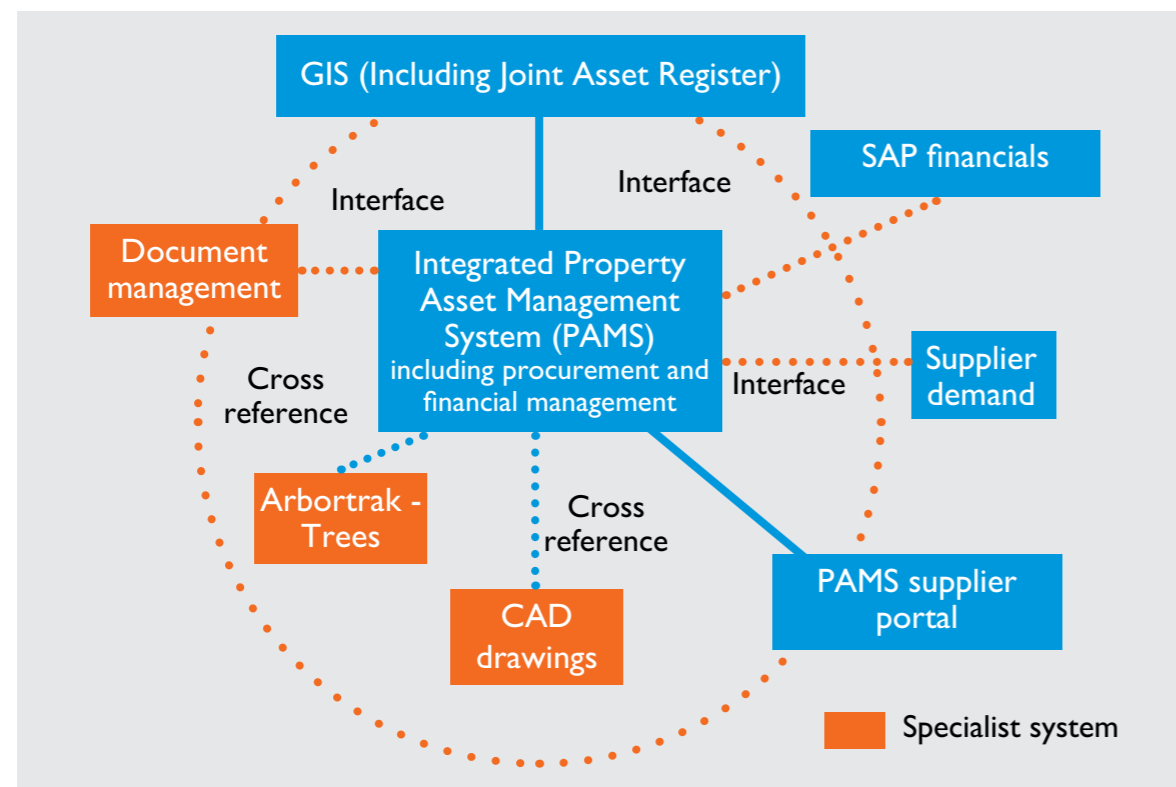
The following diagram illustrates the functionality of the new system, the information owners and its users inside and outside the county council:



Alongside PAMS, GIS is a key tool for handling geographic information. It will integrate with PAMS and make data available visually on maps, though the council’s GIS capability and the link with partners is an improving area.

AutoCAD will provide the tool for managing spatial information such as floor and site plans. CAD will be the master source of all spatial data where possible. Accurate spatial data is key to measuring the performance of assets as well as being an integral part of the day to day business of the property service.

The following diagram illustrates the relationships between the systems going forward:



Moving forward, Property Services will work in partnership with Hampshire County Council to deliver new improved property information systems and processes in order to deliver an improved level of service to customers.

## Data sharing with partners

The principal public sector partners in Surrey have expressed a common desire to share buildings and facilities across the county. This resulted in a review of the Surrey public sector estate including assets of Surrey district and borough councils.

A Joint Asset Register (JAR) was created with partners in Surrey, containing financial information (building running costs) about the property assets as well as core information such as location, size and use. The JAR holds data for the public sector estate consisting of 8,000 property interests spread over approximately 2,800 sites. The data can be shown on the map base of Surrey and can be broken down by area (district/borough, town etc), showing the ownership of the assets.

## Document management

Although most new documents are electronic, many documents are still filed in hard copy filing systems and also include a large amount of historical records on property assets. The information is therefore difficult to access and this is compounded by the use of different file references across the service.

Property Services is developing a strategy for improving access to electronic documents and developing a business case for implementing an Electronic Document Management System (EDMS).

In the short term, the document library is in place and will be expanded to incorporate other relevant documents. The documents will be linked to the new Property Asset Management System (PAMS).

## Data transparency

As part of the PAMS project (implementation of a new property asset management system) it is the intention to make property information more accessible and transparent. It is presumed that all property information will be made generally available unless there is good reason for not doing so such as commercial sensitivity.

Property data will be provided on appropriate platforms to ensure ease of access to users. It will enable user access irrespective of their location. Platforms include the internet, intranet, and supplier hosted cloud computing.

Information has also been made available on central government web sites as part of the national demonstrator map.

For internal customers, technology will allow access to property information that was not previously available such as information on Helpdesk calls linked to reactive building maintenance. This will provide customers with improved visibility of the status of works and cut down the number of direct interactions between the helpdesk and the customer.

Moving forward, the property service is striving to make information available to all stakeholders in a clear and transparent way on platforms that will enable the widest possible access to information in order to improve services delivered.

## Reporting

Reporting is key to decision making in the property service and supports the governance process and general management of day to day property business. It is broken down into three categories:

- decision making – at departmental, directorate and Cabinet level
- performance - regular reporting of key performance indicators at departmental and directorate level
- business planning and improvement – regular reporting of progress against plans and targets at departmental and directorate level.

As part of the Property and Asset Management System (PAMS) implementation, all reporting in the service will be reviewed and new reports designed where necessary. Process reviews will analyse the use and required frequency of reports.

PAMS will enable the development of Dashboard reporting to support financial control, progress tracking of projects, and estate management tasks such as acquisitions, disposals and rent reviews. Information from PAMS will be incorporated into corporate reporting systems such as the Finance Dashboard, which will go live in April 2013.

Property Services aims to provide a versatile reporting mechanism enabling access to property information to those who require it.







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