

Audit & Governance Committee
28 September 2015

Property Asset Management System - Update

Purpose of the report:

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

Recommendations:

The Committee is asked to:

- a) Note the conclusion of the joint implementation project with Hampshire County Council.
- b) Note progress made and recognise the achievements of the joint project with Hampshire County Council.
- c) Recognise any further development of PAMS as part of Property Services "business as usual" service delivery.

It is therefore anticipated that this will be the final report to come to this Committee.

Introduction:

2. This is a progress update on the PAMS system that has been implemented in Property Services. PAMS is an externally hosted web based system, called Atrium Enterprise Asset Management.
3. PAMS provides a fully integrated property information system that will facilitate partnership working, bringing together property asset data, financial information, maps, spatial data from CAD plans, and document management.
4. The system was procured jointly with Hampshire County Council and has been implemented in collaboration with them. The Framework Contract is open to in excess of 50 public sector organisations in the southeast including all SE7 partners and associated district and borough councils.

5. To date, four other local authorities have purchased Atrium through the Framework and are implementing the system designed and managed by Surrey and Hampshire County Councils, as lead partners.
6. The PAMS system is a modular system and several key modules went live in April 2013 followed by the remaining modules through 2014.
7. The implementation of PAMS was phased, based on agreed priorities for both Surrey and Hampshire County Councils.
8. At the time of the last full report to Committee in May 2014, the project team were working on implementing remaining system functionality and supporting and developing business as usual processes in live modules.

Progress Update

9. The joint implementation project with Hampshire CC has been formally concluded and all further development of the system has been brought into business as usual operations. Surrey and Hampshire County Councils are still lead partners on the Framework and continue to work together in that capacity.
10. The Performance Team in Property Services has recently been restructured and incorporates roles for the ongoing development and maintenance of the system.
11. For information, other Councils including East Sussex, Brighton & Hove, Eastbourne and Reading have procured from the PAMS Framework contract and are progressing their implementations.
12. There has been significant progress in the implementation of the system since the last full report to committee in May 2014 and details of this are shown in the table below.

Progress Since May 2014

<i>Deliverable</i>	<i>Status as at May 2014</i>	<i>Current Status</i>
Property Portal - On-line access to property information/documents.	Tested and ready for go-live to "Pilot" users (10 schools).	Live for all schools using SCC Property Services
Request Portal – On line access to fault reporting.	Tested and ready for go-live to "Pilot" users (10 schools).	Live for all schools using SCC Property Services
Education Sufficiency & Suitability (inc. Calculation of school net capacity assessments).	User acceptance tests complete and go-live scheduled.	Live
Landlord/Tenant Management (Managing leases, service charges and other agreements – payable and receivable).	User acceptance tests complete and go live scheduled.	Live for lease and licence management/data maintenance. Interface to SAP for payments & receipts go-live scheduled for September 2015

Recording of property acquisitions & disposals.	System developed and ready for go-live in mid-June 2014.	Live
Storing of building manuals and other reference files.	Tested and ready for go-live with Property Portal (listed above)	Live
Condition Surveys	Future development planned	Live collecting data through mobile devices
Performance Monitoring and Benchmarking	Performance Monitoring enabled for Building Maintenance business area.	Investigating add on functionality called "Atrium Vision". Demonstration to Surrey and East Sussex carried out on 4 th September 2015.
Training Plan	In place and underway to cover training for all Property staff, selected service staff and contractors.	All property staff trained in main system modules. Required contractors and service staff trained – continues based on need.
CAD floor plan integration (Interface for spatial data).	Future development planned.	Live

13. As well as the deliverables outlined in the table above, there has been considerable progress in improving parts of the system already live.

They include:

- a) the streamlining of maintenance and Help Desk processes
- b) the adoption of the system by more external suppliers enabling the application for payment and approval of payments through electronic workflow in the Contractor Module
- c) the development of financial monitoring and other reports
- d) the capture of more detailed information about our properties and associated plant and equipment held in the core Portfolio Inventory module.

Partnership Working:

14. Surrey CC and Hampshire CC will continue to work together as lead partners in the Framework and will manage the Service Panel that oversees changes to the shared PAMS system.
15. Since the launch of Orbis in April 2015 there has been an opportunity to work more closely with East Sussex County Council. East Sussex have procured PAMS from the Surrey/Hampshire Framework and this has offered up an opportunity to work jointly in developing our systems and processes. PAMS will be an enabler of partnership working across the Orbis Property Service.

16. A lessons learned exercise was carried out with Hampshire CC on the joint implementation and a comprehensive log produced in April 2015. Key learning points that came out of the exercise included:
 - a) Allow more time, or more time-contingency to configure the system and prepare data to transfer
 - b) Ensure resources, project team and stakeholders, are aware of the commitment on their time at the earliest stage, especially when a fast-paced implementation is required.
 - c) Working in partnership has great advantages such as sharing knowledge and best practice, but some disadvantages with the consultative decision making process taking more time.

PAMS Disaster Recovery:

17. One of the benefits of the Property Asset Management System is that it is a single system that can be shared across partners if there is the desire to work in partnership. Data is separated by security configuration within the system.
18. As a shared system hosted remotely in the “Cloud” by the provider, and with currently five local authorities accessing the system, the resilience of the system is of paramount importance to the user organisations.
19. Resilience of the system was recognised as an important factor in the procurement of the Atrium system and appropriate disaster recovery and service level requirements were factored in by the IT departments at Surrey CC and Hampshire CC.

PAMS Benefits Review:

20. A benefits review was carried out at the end of 2014 by the Maintenance Delivery Manager and Performance Manager. The review covered building maintenance, property help desk and the core database of property information that went live in April 2013.
21. PAMS in conjunction with new maintenance contracts has resulted in significant benefits including financial savings. Benefits are wide ranging, covering better access to property information, greater financial control, more efficient processes, and improved service to customers.
22. More detail of benefits identified in the review can be found in Appendix A, attached.

Conclusions:

23. The joint PAMS Implementation Project with Hampshire CC is formally concluded with Surrey CC achieving the successful implementation of the Atrium Enterprise Asset Management System

24. The maintenance and future development of the system is being carried out in the restructured Property Performance Team. We have the right resources with the right skills to take the system forward.
25. The Property Service is benefitting from a system that supports the majority of its business areas delivering a set of property data in a single integrated system.
26. Along with process reviews, the PAMS system is helping us achieve leaner and more efficient ways of working. More details of benefits can be found in Appendix A.
27. The main foundation stones now in place will enable us to adapt to changing business requirements going forward.

Financial and value for money implications

28. There are no direct financial implications of this report. All financial implications of the PAMS project and any impact on the 2015/16 budget have been considered and have been funded from the “invest to save” budget.

Equalities and Diversity Implications

29. There are no direct equality implications.

Risk Management Implications

30. Risks relating to PAMS are managed in the same way as other risks in Property Services on a centrally managed risk register.

Next steps:

31. Property Services will continue to develop the use of the system as part of its business as usual service delivery.
32. Work will continue with East Sussex County Council, as part of Orbis, to align systems and processes in PAMS and complete the East Sussex PAMS implementation.
33. Work will continue with the development of system reports to support all areas of the Property Service. The “Atrium Vision” product will be investigated to enable data in the system to be used for strategic planning.
34. Surrey and Hampshire County Councils will work with other interested local authorities that wish to buy from the contract and manage this through a Service Panel to ensure activities are coordinated.

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Sources/background papers: None

Property Asset Management System Benefits Review

Greater Financial Control	Delegated authorities within the system allow us to have better financial control of maintenance projects and provide a fully auditable financial process.
	An “in system” change control process is now in place that ensures that all variations to maintenance work carried out are fully approved. This helps to avoid scope creep and provides stronger financial control over the amount and cost of works being undertaken.
	The ability to customise and run financial reports at any required time within the service, provides us with full control and transparency of spending against a budget code throughout the financial year.
	A stronger control of budget allocation, with validation based on the options chosen within the budget code hierarchy, reduces the risk of miscoding when processing orders and allows us to maintain greater financial control over spending.
	Managing cyclical maintenance within PAMS provides us with a clear visibility of the unit and annual costs of maintaining plant and equipment.
Streamlined process for logging and processing reactive maintenance requests	PAMS allows us to log reactive maintenance calls and place orders within one system where previously we were required to use two. This has reduced the risk of human error occurring when recording requests and a reduction in the time taken to place orders. As a result Helpdesk operators are able to carry out more value added tasks that have improved customer service.
	In built system prompts reduce the risk of duplicate orders being created, ensures that orders are placed within the correct defined responsibilities and allows an informed decision of the types of works to be undertaken based on prompts regarding special circumstances at a site, such as a listed building.
	A fully electronic end to end maintenance process that allows all parties involved to share

	<p>real time information.</p> <p>A more accurate record of responsive calls logged through the Property Helpdesk has provided us with stronger data to inform the planned maintenance programmes to allow us to prioritise the spend to the areas of most need.</p> <p>A fully electronic, end to end procure to pay process that allows contractor access to receive orders, provide live updates and request payment.</p>
Improved Transparency	<p>The programme management module allows us to manage large programmes of work and group work packages. This provides better visibility of works being carried out across the organisation.</p>
	<p>A fully electronic process and system that is used by all stakeholders involved provides an increased level of transparency and accountability for works that are being undertaken.</p>
	<p>A centralised, highly visible location for all core Property Information has led to improved data quality and consistency of the data used across the department.</p>
	<p>PAMS has allowed us to record ownership and have full control over our plant and equipment asset data which improves our ability to monitor tasks completion within the time limit set. Through having more accurate information, it has the potential to bring financial benefits when tendering future contracts.</p>
Improved Customer Service and Communication	<p>Automatic notifications to stakeholders, including customers, at key stages within processes.</p>
	<p>The system provides workflow notifications that provide a full audit trail of tasks to be undertaken and when they are completed.</p>
	<p>The Property Portal allows schools to report and track fault/work requests, contact the helpdesk and view value added information such as CAD plans and site reports through one centralised point. This has streamlined and improved the customer experience when</p>

	contacting the Property Helpdesk.
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