

**AUDIT & GOVERNANCE COMMITTEE**

Date: 21 February 2013

**Progress Report – Property Asset Management System
(PAMS)****PURPOSE OF THE REPORT:** Progress Update

The purpose of this report is to introduce the Property Asset Management System (PAMS) implementation project and update the Committee on progress made in the delivery of a new Property Asset Management System.

INTRODUCTION:

Following the in-sourcing of key property services in 2010, previously provided by external consultants, a review of property information systems used by Property Services was carried out. It concluded that the main systems in use, SAP Real Estate and Plant Maintenance, were inadequate and had significant gaps in functionality that made it difficult to carry out the day-to-day management of the estate, manage its performance and support property strategy.

The decision was taken to research the market for a specialist property management system that would support the whole property lifecycle from acquisition to disposal. A business case was built to procure and implement a new system and was recommended by Investment Panel.

At the same time Surrey and Hampshire County Councils had embarked on a piece of work that led to collaboration on letting building services contracts and as a consequence of working together it was identified that Hampshire County Council also had a requirement to replace their SAP system with a specialist property management system.

It was agreed that a joint procurement and implementation would benefit both Councils. It was also agreed to engage with other public sector organisations in the South East to see if they wanted to be named in the resulting contracts. Following the approval of the business case, a Joint Working Agreement was signed and the Property Asset Management System (PAMS) project commenced.

The procurement phase of the project concluded at the end of June 2012 with the signing of a Framework contract with Atrium Property Systems. 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.

RECOMMENDATIONS:

The Committee is asked to:

- a) Note the progress made against the implementation plan so far and recognise achievements to date.
- b) Agree to receive further updates on progress against planned activities at future Committee meetings, as required.

PAMS OVERVIEW & BENEFITS:

Good quality, consolidated property data is recognised as a key tool in driving value from the council's property assets and improving customer service. It is used for the day-to-day management of assets, measuring their performance and providing information to support asset strategy.

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 ensure the Property Service is fit for partnering and 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.

The implementation of PAMS has been split into 5 phases covering the range of property management activities. The phases are based on agreed priorities for Surrey and Hampshire County Councils. Details of all Phases and what they contain can be found in Appendix A.

Key components of the system are:

- Physical Property Data (Sites, Land, Buildings, Rooms, Plant & Equipment)
- Functional Property Data (The usage view of property)
- Works Delivery (Maintenance and Major Projects and Programmes)
- Property Help Desk
- Estate Management (Landlord/tenant management – rent collection/payment)
- Property Portal (Access for contractors and customers)
- Performance Monitoring
- Document Management, CAD and GIS interfaces

The system will be integrated with County Council corporate applications including SAP financials, Geographic Information System, CAD, and will have document management capability.

Benefits

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

- Improved management of rents payable and receivable in line with Internal Audit recommendations
- 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

Consultants and contractors employed by the council will use the PAMS in the delivery of services commissioned, helping improve the quality and integrity of the management information on the system and giving a holistic view of property assets.

Working in partnership with Hampshire County Council has been beneficial in reducing procurement costs and in sharing good practice in the development of improved business processes.

Improving business processes is key to driving out benefits from the PAMS implementation. Although the system will deliver some benefits such as automation of tasks, it is important that the business process is thought through to take advantage of workflows and notifications that will lead to process efficiencies.

PROGRESS TO DATE:

All project tasks are identified and recorded on the PAMS project plan and issued as work packages to officers responsible for their delivery by the IMT Project Manager. The following tasks have been completed or are in progress:

Pre-tender & Procurement Phase

- Market research for suitable property management systems
- Joint Working Agreement signed by Surrey and Hampshire County Council
- SCC, HCC and joint project boards set up
- Joint specification agreed and tender process completed
- Contract awarded to Atrium Software Ltd. Contract managed by Surrey County Council
- Framework contract signed with in excess of 50 other public sector organisations named in it, including SE7 partners and associated district and borough councils.
- Project Initiation/Set up completed.

Phase 1A

- Development and Training systems set up.
- Property master data has been prepared and tested on the Atrium System. The opportunity to cleanse data before migration is being taken
- Training has taken place for key staff that will administer the system and maintain property master data

- CAD integration developed and GIS integration in development
- Presentation delivered by Atrium/SCC/HCC to SE7 and other named authorities on the Framework contract at County Hall in November 2012

Phase 1B

- All work packages associated with Phase 1B (see Annexe A) are in progress covering Responsive, Planned & Cyclical Maintenance, Landlord and Tenant Management (Rent collection and Payment)
- Joint workshops with Hampshire County Council have taken place to develop an understanding of the system and associated processes.
- Maintenance suppliers have been engaged who will be using the system to receive work orders and submit payment requests
- Schools have been engaged and updated on progress through Premises Briefings in November 12

CONCLUSION:

The full implementation of PAMS will deliver benefits that will improve customer service and help drive value from property assets.

The project is on track to deliver a Phase 1B go live for Maintenance in April with the system ready to process Rent Payment & Receipts from the end of the first quarter 2013/14.

Having a single source for the majority of property information will improve the efficiency of day to day property management.

The Framework contract with Atrium, open to all other local authorities in the South East, will support and enable partnership/collaborative working.

Financial and value for money implications

There are no direct financial implications of this report. All financial implications of the PAMS project and any impact on the 2012/13, 2013/14 budget have been considered in the business case and are funded from the “invest to save” budget.

Equalities Implications

An equalities impact assessment has been carried out for the PAMS project and there are no direct equalities implications of this report.

Risk Management Implications

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

WHAT HAPPENS NEXT:

The PAMS implementation will continue through the planned phases (Annexe A). We are currently in Phase 1B and the functionality in that phase will be implemented for a go-live on 2nd April 2013.

To achieve the April go-live, work packages will be completed as defined in the project plan and appropriate staff will be trained.

Surrey and Hampshire County Councils will work with other interested local authorities that wish to buy from the contract and will set up a group to oversee that process.

As the one system will be shared by partners buying through the Framework contract, the above group will also oversee the process for future developments in the system to ensure suitability for all partners.

CONTACT DETAILS: John Stebbings/Nigel Jones

Sources/background papers: Annexe A PAMS Implementation Timeline

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