

Place & Resources Scrutiny Committee

12 September 2023

Property Strategy & Asset Management Plan Update

For Review and Consultation

Portfolio Holder: Cllr A Parry, Assets and Property

Local Councillor(s): County wide

Executive Director: J Sellgren, Executive Director of Place

Report Author: Peter Hopkins

Job Title: Corporate Director for Assets & Property

Tel: 01305 221610

Email: peter.hopkins@dorsetcouncil.gov.uk

Report Status: Public

Brief Summary:

This report provides an update on progress in relation to the Property Strategy & Asset Management Plan, adopted by Cabinet on 3 November 2020.

Recommendation:

1. That the Scrutiny Committee review and comment upon progress in achieving the actions identified in the Property Strategy & Asset Management Plan.
2. That Scrutiny Committee notes the progress to develop a new Strategic Asset Management Plan.

Reason for Recommendation:

1. Executive Summary

1.1 Assets & Regeneration has a key role in supporting Dorset Council achieve its strategic priorities and deliver on the leader's key commitments to make a positive impact on Dorset - the place and the people. This includes:

- underpin a financially and environmentally sustainable council.

- become a high performing team and culture with an underpinning operating model.
 - with an effective corporate landlord model/a successful capital programme.
- 1.2 In the 2022 update to Places & Resources Scrutiny Committee it was recognised that the current Property Strategy and Asset Management Plan (PSAMP) does not have clear links to the priorities that are contained within the Council's Plan, does not include factors such as the obligations that as a council we have now signed up to for the Climate and Ecological strategy and action plan, and some of the actions in the management plan have unrealistic timescales.
- 1.3 In June 2022 South West Audit Partnership (SWAP) were tasked with undertaking an audit of the PSAMP and plans for a new Strategic Asset Management Plan (SAMP). They reported in September 2022 and noted:
- “The current Property Strategy and Asset Management Plan (PSAMP) does not support Services to achieve the Council's ambitions within the Dorset Council's Plan 2020/24.”*
- 1.4 Over the past 12 months work has progressed on the development of a new operating model and SAMP for Dorset Council.
- 1.5 The organisation has worked with property consultants Public Intelligence to **develop improved strategic thinking, governance, due diligence** and capacity within Assets and Regeneration and the wider **corporate body**.
- 1.6 To date, governance processes have been updated, with the introduction of an options appraisal tool aligned with the council plan, as well as a business case template. All proposals with assets implications are now required to go through the options appraisal and business case model.
- 1.7 Rationalisation work continues, and a series of rapid asset reviews have been undertaken to identify assets for repurposing or disposal.
- 1.8 Additionally, the implementation of the effective property services model (corporate landlord) is underway, with Libraries being the first group of assets to transfer into this new model by April 2024.
- 1.9 As a result of this work, plans to develop a new SAMP were revisited and rescoped. The development of a new SAMP has been aligned with the implementation of the effective property services model (corporate landlord).

- 1.10 Extensive engagement is planned with senior managers and leaders to ensure the new SAMP is recognised as a whole authority owned strategy, thereby enabling the implementation to be effective.
- 1.11 It is envisaged the new SAMP will be in place by the end of April 2024. Being considered by Place & Resources Overview Committee 21 March 2024, and Cabinet 16 April 2024.
- 1.12 The new SAMP will be an organisation wide strategy, which sets out how the council will manage its asset portfolios to deliver the council's priorities and ambitions laid out in the Council Plan.
- 1.13 Whilst the development of the new SAMP is ongoing, Assets & Regeneration will continue to deliver against the actions set out in the PSAMP 2020-2024. A progress update and next steps are included in the attached appendix (Property Strategy & Asset Management Plan Progress Report September 2022).

2. Financial Implications

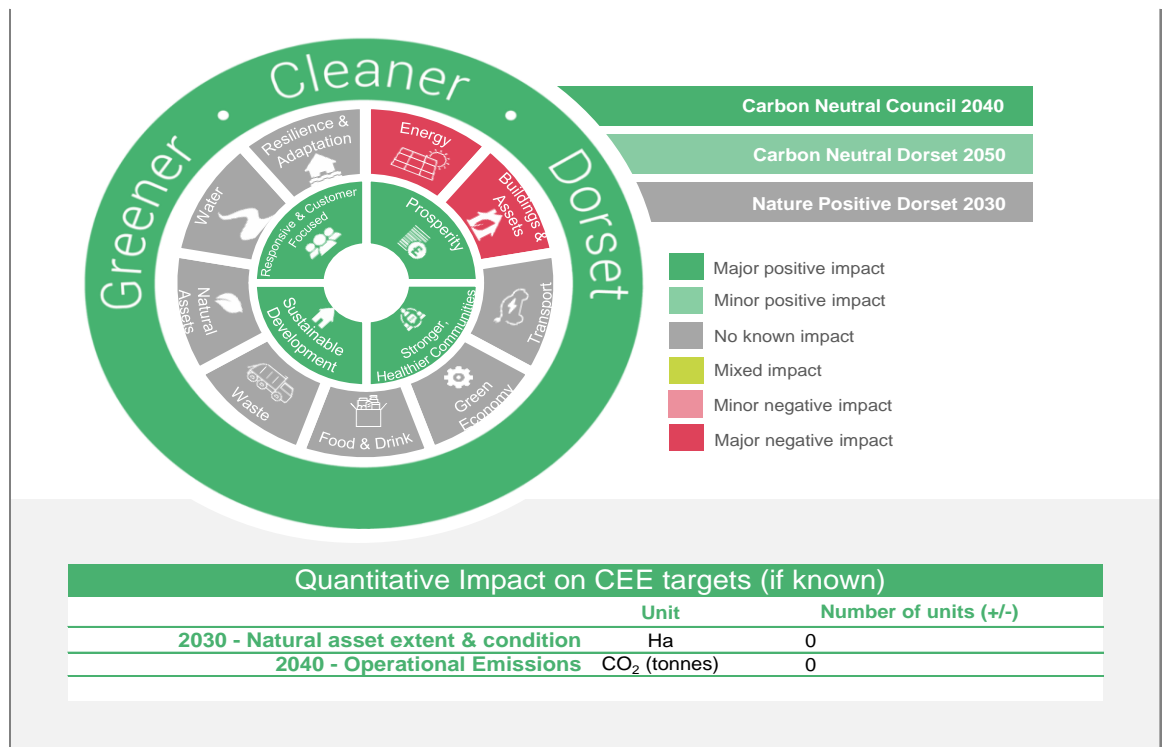
- 2.1 The effective management of the council's asset base allows for rationalisation, development, repurposing and disposals which generate revenue savings and capital receipts, generate income for the Council, and help the Council to deliver its priorities, including social and environmental.
- 2.2 Financial costs and benefits are approved and reported on an individual project basis via the Council's governance and approval processes and procedures.

3. Natural Environment, Climate & Ecology Implications

- 3.1 As noted in 1.2, the current Property Strategy and Asset Management Plan does not have clear links to the priorities that are contained within the Council's Plan, does not include factors such as a proper and embedded reflection of the climate and ecological strategy and action plan, a key priority for the council.
- 3.2 The new Strategic Asset Management Plan will be an organisation wide strategy, which will set out how the Council will manage its asset portfolios to deliver the Council's priorities and ambitions laid out in the Council Plan, including those related to climate change and environmental implications. How we manage our estates will form a key element of whether we are successful in meeting our climate and ecological aspirations.

3.3 Whilst the development of the new Strategic Asset Management Plan is ongoing, Assets & Regeneration will close closely with the Climate & Ecology team to deliver the assets related targets within the Council's Climate & Ecology Strategy, as well as integrating climate and ecological metrics into options appraisals and business cases as part of the wider changes to council decision making.

3.4 Climate Decision Wheel To note, the SAMP does not include proposals for individual assets, as such it is not possible to answer many of the questions related to individual assets and the impact therefore shows as 'major negative impact'. However, the SAMP will guide decision making on individual assets and groups of assets, and it is anticipated the climate decision wheels related to these subsequent proposals will show better outcomes related to buildings & assets.



ACCESSIBLE TABLE SHOWING IMPACTS

Natural Environment, Climate & Ecology Strategy Commitments	Impact
Energy	major negative impact

Buildings & Assets	major negative impact
Transport	No known impact
Green Economy	No known impact
Food & Drink	No known impact
Waste	No known impact
Natural Assets & Ecology	No known impact
Water	No known impact
Resilience and Adaptation	No known impact

Corporate Plan Aims	Impact
Prosperity	strongly supports it
Stronger healthier communities	strongly supports it
Sustainable Development & Housing	strongly supports it
Responsive & Customer Focused	strongly supports it

TABLE OF RECOMMENDATIONS

Recommendations	Responses -will this be incorporated into your proposal? How? And if not, why not?
Energy	
Ensure all electrical equipment is the most energy efficient	The SAMP does not include proposals for individual assets or buildings. However, it is anticipated that proposals emanating from the SAMP will include energy efficiency considerations
Maximise energy efficiency of the building fabric (e.g. Loft & wall insulation, triple glazing)	As above
Buildings & Assets	
No recommendations found for this category	
Transport	
No recommendations found for this category	
Green Economy	
No recommendations found for this category	
Food & Drink	
No recommendations found for this category	
Waste	

No recommendations found for this category	
Natural Assets & Ecology	
No recommendations found for this category	
Water	
No recommendations found for this category	
Resilience & Adaptation	
No recommendations found for this category	

4. **Well-being and Health Implications**

- 4.1 There are no specific health and wellbeing implications of this report. However, the effective management and repurposing of the Council's assets supports the delivery of the Council's priorities, which in turn have an impact on the health and wellbeing of residents and employees.

5. **Other Implications**

- 5.1 n/a

6. **Risk Assessment**

- 6.1 **HAVING CONSIDERED: the risks associated with this decision; the level** of risk has been identified as:

Current Risk: Med
Residual Risk: Med

- 6.2 Assessment at medium risk is based on partial delivery of the Asset Management Plan to date, including delays in implementation of the corporate landlord model.

7. **Equalities Impact Assessment**

- 7.1 An Equalities Impact Assessment will be undertaken as part of the development of the new Strategic Asset Management Plan.
- 7.2 Equalities Impact Assessments are undertaken on an individual project basis.

8. **Appendices**

8.1 Appendix 1 Property Strategy & Asset Management Plan Progress Report
September 2023

9. **Background Papers**

[Property Strategy & Asset Management Plan](#)