

City of Lincoln Council
Corporate Asset Management Plan

January 2015



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FOREWORD

Property assets are an important contributing factor to the quality of public services. Well designed, well maintained and well used buildings in addition to supporting services can engender confidence in the professionalism of the council and act as a stimulus to wider regeneration of the area. As the nature of public services change as a result of constrained public expenditure and rising expectations over service quality so the council's property portfolio needs to change.

For all its services and administrative functions the council needs to question where it needs to be and how much and what type of space is required. Buildings cost money to provide and maintain and in the context of constrained public expenditure each building needs to be assessed in terms of its need, cost and performance. This Corporate Asset Management Plan articulates a broad vision for the future and sets a framework for action which needs to be developed over time and which will see the council's portfolio of buildings change to respond to this new environment. The strategy emphasises the need ***to manage the council property portfolio to support the city's growth and to lower the council's overall operating costs.***

The council owns different types of properties for different purposes with each requiring a specific management focus. These include operational buildings which are used directly to provide the council's service; administrative buildings to accommodate council staff; investment properties held to support wider economic regeneration and a number of historic assets for which the council has a stewardship role. This strategy reflects these different perspectives of the portfolio. The strategy is not a static document but part of a process designed to engage Members, officers and customers in a debate about the nature of; and future management direction for the council's property resource. It is intended to promote a common understanding of emerging issues and intended actions.

Councillor Ric Metcalfe
Leader of the Council

Angela Andrews
Deputy Chief Executive

INTRODUCTION

Purpose & Scope of the AMP

This Corporate Asset Management Plan (AMP) identifies the key strategic policy and resource influences affecting the City of Lincoln Council and in response to these sets a broad direction for asset management over the medium term enabling its property portfolio (and associated professional support) to be optimised to meet identified needs. It facilitates rational property decision making based on identified council priorities. The plan has a 5 year time horizon but will be updated periodically to reflect changing circumstances. The AMP is restricted to consideration of property assets that the council owns or uses (excluding houses) and sets a programme of action for the property portfolio over the medium term. It is a practical tool which helps to define, implement and measure how the council:-

- Makes its investment decisions
- Maintains and improves its assets
- Increases the cost effectiveness of its portfolio
- Ensures the property portfolio is 'fit for purpose'
- Promotes innovation and development in asset management
- Listens and responds to property users

Why Asset Management is Important

The Council places strong emphasis on the role of asset management in improving value for money and better public services. Property has an influence in delivering better outcomes for citizens and in creating a sense of place. Public sector performance and confidence in services are inextricably linked, and property underpins this linkage. Infrastructure, like property, is essential for the technology, business processes and cultural change which are required to raise the council's performance. This link between property and effective local services is summarised below.

- **Customer perception** - Buildings can engender confidence that an organisation is capable and professional and has an influence on a customer's experience
- **Access to services** - The physical location and design of buildings can improve accessibility to services
- **Staff issues** - A good work environment can motivate staff and a good physical environment sends a message that staff matter
- **Efficiency** - Good asset management can ensure space is used effectively, costs minimised and release resources for corporate and service priorities

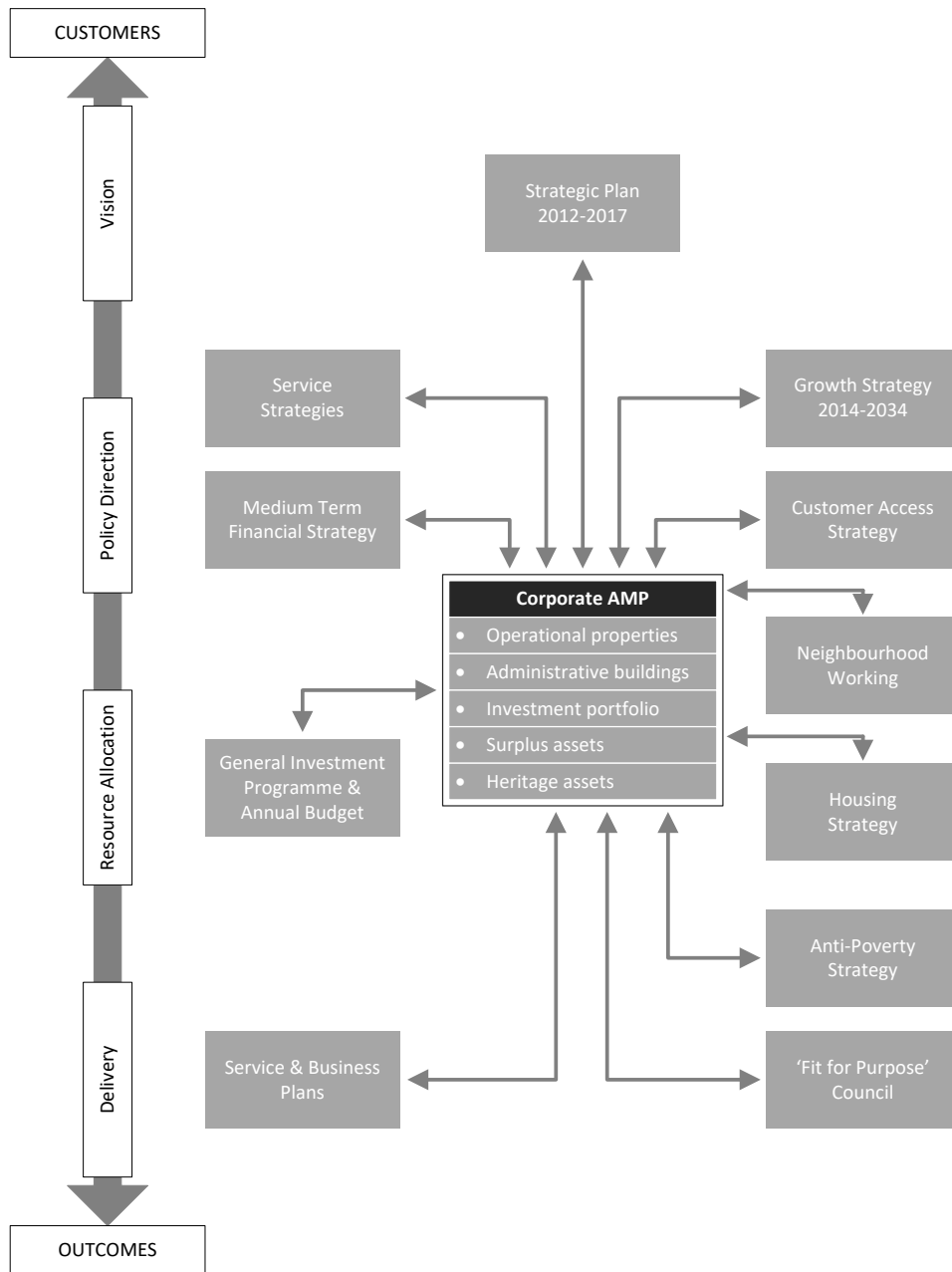
- **Regeneration** - Management of investment through property (& its location) can facilitate regeneration

Linkages with Other Strategies

The Corporate AMP does not exist in isolation but is set against wider corporate and service strategies and to resource allocation and deliver plans. The linkage of the AMP to most important of these strategies is illustrated below.

Diagram 1 – Linkage of the Corporate AMP to other Council Strategies

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Overview of the City

The City of Lincoln is one of seven districts in Lincolnshire. It is the administrative centre of the county and differs from neighbouring districts in that it is a small and densely populated urban area within a large rural and sparsely populated county. The city has a population of 93,100 within the city's small administrative area of 3,571 hectares. There is a strong neighbourhood association and thus a big local community identity within the city. There has been residential growth adjacent to the city, and although this falls within neighbouring districts, many of the residents associate with Lincoln and draw on its services. This, coupled with the influx of students to the university places a strain on housing and council services. The number of people aged 18-24 is higher than the national average. The economy of the city is based on

service and distribution industries and the travel to work population is significantly larger than that in the city itself. Tourism is also an significant component of the local economy. The affluence and grandeur that most visitors see when they visit the cathedral area of the city masks some pockets of relatively high levels of deprivation.

The Council's Property Portfolio

The council owns a large and diverse property portfolio. In its simplest terms the portfolio can be sub-divided into four main asset type. Each of these asset types can be a non-heritage or a heritage asset thus making five broad asset categories in total.

- Operational – Assets held for direct provision of council services
- Administrative – Assets held in support of the council's function (office buildings)
- Investment – Assets held for economic objectives rather than service provision
- Surplus – Assets held pending disposal.
- Heritage – Assets with special significance because of its heritage

The table below summarise the council's portfolio into these broad categories.

Table 1 – Summary of Council of Assets by type (£000s)

Asset Type	Non-Heritage		Heritage		Total	
	No.	Asset Value	No.	Asset Value	No.	Asset Value
Operational	151	54,300	15	4,475	166	58,775
Administrative	3	5,220	1	752	4	5,972
Investment	83	10,080			83	10,080
Surplus	63	441	1	875	65	1,316
Total	301	70,041	17	6,102	318	76,143

Note: In addition the council owns 7869 houses with an asset value of £170,4M for capital accounting purposes. These are outside the scope of this corporate AMP. The count of heritage assets in the table above is restricted to buildings only. There are other heritage assets over and above these buildings which the council owns.

These different types of property assets have a different rationale for ownership, management issues and priorities. These are summarised at a high level in Appendix A.

Format & Content of the AMP

The AMP is arranged in five parts with appendices containing supporting material. Each part can be read on a stand-alone basis and collectively they constitute the Corporate AMP.

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- **Part 1** provides a statement of strategic direction for property asset management through an analysis of the environment in which the council is operating and its own priorities in response to this.
- **Part 2** describes the council's current policy and practice with respect to asset management, and is designed to provide a commentary against current 'Best Practice' in asset management.
- **Part 3** provides information on the size and nature of the property portfolio under thematic headings, and is designed improve understanding of the portfolio and to raise awareness of emerging issues in the estate.
- **Part 4** gives details of major project initiatives under-way or on the immediate horizon and acts as a summary of work in progress.
- **Part 5** provides a review of performance. It identifies key achievements looking backwards and a summary of key performance measures related to property services (the activities undertaken by the council in managing its portfolio) and of the portfolio itself (the buildings the council owns or occupies).

The AMP is amplified through supporting material in the Appendices.

PART 1 – STRATEGIC CONTEXT & DIRECTION

Influences for Change

There are a range of influences that are driving change in the city and to which the council must respond through its portfolio management. These can be recognised at both a national and local level.

- **National**

The medium term resource context is shaped by significant national debt which needs to be reduced. This means an era of public spending constraint and a drive for **efficiency savings** to encourage better use of limited financial resources. This emphasis on efficiency allied with raising public expectations implies a need for **public service transformation** and a focus on exploring new ways of delivering services. An implicit assumption through government public spending reviews is that property will contribute to savings through capital receipts or reduced running costs. There is also a policy drive for sustainable communities in order to create areas which are attractive places, to live, work and play. Part of this is concerned with encouraging **citizen participation** (Small State - Big Society) and **One Public Estate** which is concerned with managing collective property assets as a single portfolio.

The **localism** agenda is concerned with **decentralisation** – moving power, money and knowledge away from central government towards individuals, communities and councils. It is intended to lift the burden of bureaucracy by removing unnecessary regulation; empower communities by creating rights for people to get involved with delivery of public services; **diversify public service supply** by ‘ending public sector monopolies’; open government to public scrutiny by releasing more information and strengthen local accountability. Voluntary groups, social enterprises, parish councils and others have a **‘community right to challenge’** local authorities over their services and in future could compete to provide services. It will also be easier for community facilities put up for sale to be bought by a community group – **‘community right to buy’**.

- **Regional**

The Greater Lincoln LEP covering the city council and adjoining districts has identified several key priorities. In terms of **enabling infrastructure growth** the development of the new Lincoln east-west link road and eastern by-pass are key to unlocking growth potential. **Improving broadband connectivity** is critical for business connectivity and encouraging new enterprise. Apprenticeships and training schemes are underway to **enhance skills & workforce employability**. There is a need to **maximise inward investment** and key to this is provision of new and expanded employment sites.

Alongside this there is a need to **support key growth sectors** such as manufacturing, retail, education and tourism.

- **Local**

The council needs to respond to these national and regional influences whilst protecting vital services. To do so the council will have to **use its own resources efficiently** and in light of public expenditure constraints seek to do more for less. Lincoln needs to be promoted as a **world class city** in order to **attract inward investment, facilitate regeneration** and **promote growth**. Through its Strategic Plan the Council has identified its key priorities as to **protect the poorest** and to seek to create more **affordable housing**.

Lincoln's heritage makes the city unique and this heritage needs to contribute to prosperity and growth. Consideration needs to be given to maintaining the local distinctiveness of the historic and cultural environment of the city through **protecting heritage** and **improving the public realm**. The council has recognised climate change as a significant issue and there is a strong aspiration to **reduce the carbon foot print** of the city. As part of its own response to the pressures it faces the council is working towards a '**fit for purpose**' organisation with lean working practices embracing **new ways of working** (agile working) to **release space** and **reduce costs** and **new ways of delivering services**.

How the council manages its property assets and the broad direction it sets for asset management must be responsive to these influences for change. Public expenditure constraints will affect all services and it is important that the council's property portfolio is optimised to support these changes and that where possible capital and revenue 'tied up' in bricks and mortar is used to support the council's growth aspirations.

Resource Context

The Council is facing significant budget pressures. A savings target of £3M from its annual net revenue budget of £36M by 2016/17 has been set. To date £1.7M of savings have been achieved with £1.3M to be identified. A savings target of £250,000 has been allocated to property. There is no identification of how this target is to be met and a range of options such as income generation, asset disposals to reduce liabilities and cost avoidance are all possible. Capital resources continue to be limited. £200,000 per year is allocated towards the maintenance & investment programme over the next five years – funded through borrowing in years 1 to 3 and from capital receipts in years 4 and 5. A further £716,000 has been allocated for one-off asset improvement works and £1m identified for improvements at City Hall. Within the revenue budget £600,000 is allocated for cyclical, reactive and emergency spend and this has historically been directed towards reactive rather than planned works suggesting incipient maintenance issues in the portfolio. Additionally a one-off allocation of £329,000 has been given to address the most urgent and essential works.

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Anticipated budget reductions over the next few years coupled with limited capital resources implies the need for some radical changes to secure financial savings. The council has a strong commitment to protect services and jobs but the revenue pressures suggest that in a broad service context more needs to be done for less and differently; the targeting of scarce council finances and leverage in external funding where possible. This may require a review of how, when and where services are provided. There is a need to optimise the portfolio's contribution to these pressures and in responding to the savings target the emphasis through asset management needs to be directed towards revenue budget support (reducing revenue costs or increasing income).

Corporate & Service Priorities

There are a range of corporate aspirations to which the council's property portfolio must respond in terms of its size, nature and management. The most significant of these are highlighted briefly below.

Corporate or Council-Wide Initiatives

- **Strategic Plan** – This sets out the direction for services over the medium term, closely linked to the council's budget. It focuses on a few priorities which include: reducing poverty and inequality; increasing the supply of affordable housing; improving the council's landlord function; reducing Lincoln's carbon footprint and developing a fit for purpose council. Growth, housing and poverty are a primary focus.
- **Growth Strategy** – This is the council's long term plan to reduce poverty through growth and employment creation. It sets out key actions to enable growth using Lincoln's human capital (its people); by improving its physical environment and working with local businesses to support innovation and enterprise. Within the strategy emphasis is placed on making Lincoln a great place to live and work, developing its connectivity, exploiting and enhancing the talent of local people and working in partnership with others.
- **Customer Access Strategy** - There is a presumption of using the most efficient channel for accessing services but also a desire to give people choice. Emphasis in the future will be on 'self-service' through the web as first preference; followed by phone and lastly by face to face contact. There is also recognition of the need to support the most vulnerable in the community and an aspiration for neighbourhood working. Emphasis in the future will be about delivering services where people go rather than where the council is. There is recognition of the council brand and buildings as a manifestation of the council in the community plus a need for a welcoming image.
- **Neighbourhood working** - the council has a strong neighbourhood focus for its service delivery. This philosophy of 'close to the customer' is supported by the physical location of multi-agency community hubs in several areas of the city. There is

recognition that there may be a potential conflict between the aspiration for a strong neighbourhood presence and resource pressures; especially whilst the city also maintains a large city hall administrative headquarters. In the future more innovative ways may be required to sustain this community outreach but with less physical assets or consideration given to a dispersed office strategy allied to agile working to help sustain this neighbourhood outreach.

- **Fit for Purpose** - The council is reviewing its current methods of working and promoting more flexible working practices. The implicit assumption underlying this is the encouragement of more flexible work patterns consistent with a modern, 'fleet of foot' organisation to create a work environment which is conducive for staff and to encourage more effective use of expensive resources such as office space. The Towards Financial Sustainability Programme implies a need to review all property assets and to consider options for the future of city hall. It also includes reviewing all services and looking for new ways to deliver them and new ways of working.
- **Housing Strategy** – guides housing activity in the city over the period 2010 – 2015. It focuses around not just new and affordable homes, but better using of the existing housing stock. Bringing empty properties back into use. Key priorities include supporting improved design standard; sustainability in design, supporting vulnerable people to live independently and supporting community cohesion.
- **Anti-Poverty Strategy** – This strategy seeks to alleviate the acute poverty that exists in some areas of the city. The council is working with partner agencies on a range of projects including a bulk energy purchase scheme, development of Credit Unions, furniture recycling and supporting the living wage.

Problems & Pressures in the Portfolio

A number of issues have been recognised with the current status and management arrangements for the portfolio. These need to be addressed with an appropriate response defined through the asset management plan. These problems and pressures include:-

High Maintenance properties – the portfolio has a number of properties which have high repairing liabilities. In particular the Council's heritage estate is costly to maintain and there are some significant buildings within that portfolio which require refurbishment (e.g. Greyfriars and St. Mary's Guildhall). Car Parks are another area requiring attention as they are reaching an age where significant refurbishment/on-going monitoring is required. In terms of repairs the balance of spend between reactive and planned maintenance is indicative of incipient problems in the portfolio.

- **Significant heritage portfolio** - The city has a portfolio which includes a large number of heritage assets. These present the council with specific issues as they have limited alternative use, can be costly to maintain but are constrained in their potential for

reconfiguration because of their historic significance. The council needs to therefore blend its 'entrepreneurial role' focussed on ensuring assets are optimised in terms of need, cost or performance with a 'stewardship role' focussed on protecting the fabric of heritage buildings. Given that city's collective heritage is a key underpinning component to its growth strategy the council needs to act as an exemplar to others in how it manages and uses its own heritage assets.

- **Static Investment estate** – the council's investment portfolio is perhaps best described as 'traditional' with a mix of asset types which have been held over a number of years. It is poised for transformation however and there is potential to increase its yield and overall value from a more entrepreneurial and proactive approach to its management.
- **Defining the future of City Hall** – City Hall as the council's main administrative base has potential to accommodate more occupants/tenants. Particular challenges relate to Lincolnshire County Council's vacation of approximately 30,000 sq.ft in 2015 . The availability of vacant space provides the Council with a unique opportunity to refurbish the City Hall and work with new public sector partners to develop a one stop shop for services. It is proposed to carry out wider refurbishment of the building to improve the quality of space for the long term.

Strategic Direction – Key Themes

The property portfolio of the council; and asset management as an activity, can play a part in facilitating the council's response to these influences. The planning context implies a revised direction for asset management focussed on **managing the council property portfolio to support the city's growth and to lower the council's overall operating costs**. Asset management needs therefore to focus on:-

- **Reducing Revenue Spend** – The council faces severe financial pressures. Over the medium term the council needs to save £3M of its revenue budget. In order to do this the council will need to review how services are provided, ensure scarce resources are focussed on council priorities, seek efficiency savings and undertake 'invest to save' schemes whether there is a strong business case. For property this means examining ways to reduce discretionary running costs (such as energy, security & cleaning etc.); releasing poor performing or unwanted assets, surrendering leased buildings where possible and ensuring income opportunities from property assets are maximised.
- **Supporting Growth & Regeneration** - The council recognises a strong link between its asset management policies and regeneration. The quality and design of buildings can improve the urban realm and be a stimulus to attracting people and businesses to the area. The location of council assets as well as providing vital services can also engender a sense of community vibrancy and identity. Investment in infrastructure needs to be focussed to areas of need and used as catalyst to lever in private sector

equity. By co-ordinating infrastructure investment, reviewing the spatial distribution of council properties and working in partnership with other private and public sector agencies it will help to make the city an attractive place in which people can work, live and play.

- **Promoting Partnership working** - The current environment is promoting partnership work as an imperative for the council. Underpinning this is a need to focus on better use of scarce resources; providing client seamless access to public services and leveraging private sector equity and skills as required. Part of this is a collaborative approach to asset management so that the capital and revenue tied-up in property is optimised across the collective public portfolio; that opportunities for asset rationalisation are considered on a cross-agency basis and that shared use of buildings is promoted. As part of partnership working some consideration needs to be given to innovative mechanisms for managing parts of the portfolio – whether joint ventures, asset backed vehicles or trusts to lever in funding or protect assets.
- **Creating a Low Carbon City** - The council has a strong commitment to sustainability with a target to reduce its overall carbon footprint. The council needs to act as an exemplar to organisations within the city in order to create a low carbon city. To reduce its CO₂ emissions the council needs to occupy less space and occupy efficient buildings. Building regulations will ensure sustainability in new buildings and so existing buildings need to be a focus for action. Inefficient buildings need to be targeted for release or remedial action. The profile of sustainability needs to be raised across the council. With introduction of the Carbon Reduction Commitment Energy Efficiency scheme (CRC) effectively intruding a tax on an organisation's carbon footprint the council needs to ensure any impact on its budget is minimised.
- **Implementing New Ways of Working** – in order to respond to resource pressures the council with need to streamline its internal processes to ensure that it is a lean and flexible organisation. Key to this will be the introduction of agile working practices so that staff can work in a more location independent way reducing the need for physical space to accommodate both staff and documents. In the future there may be a more stark choice between the amount of physical space the council can occupy versus the number of staff and the range of services it can provide.

Making it Happen – A Framework for Action

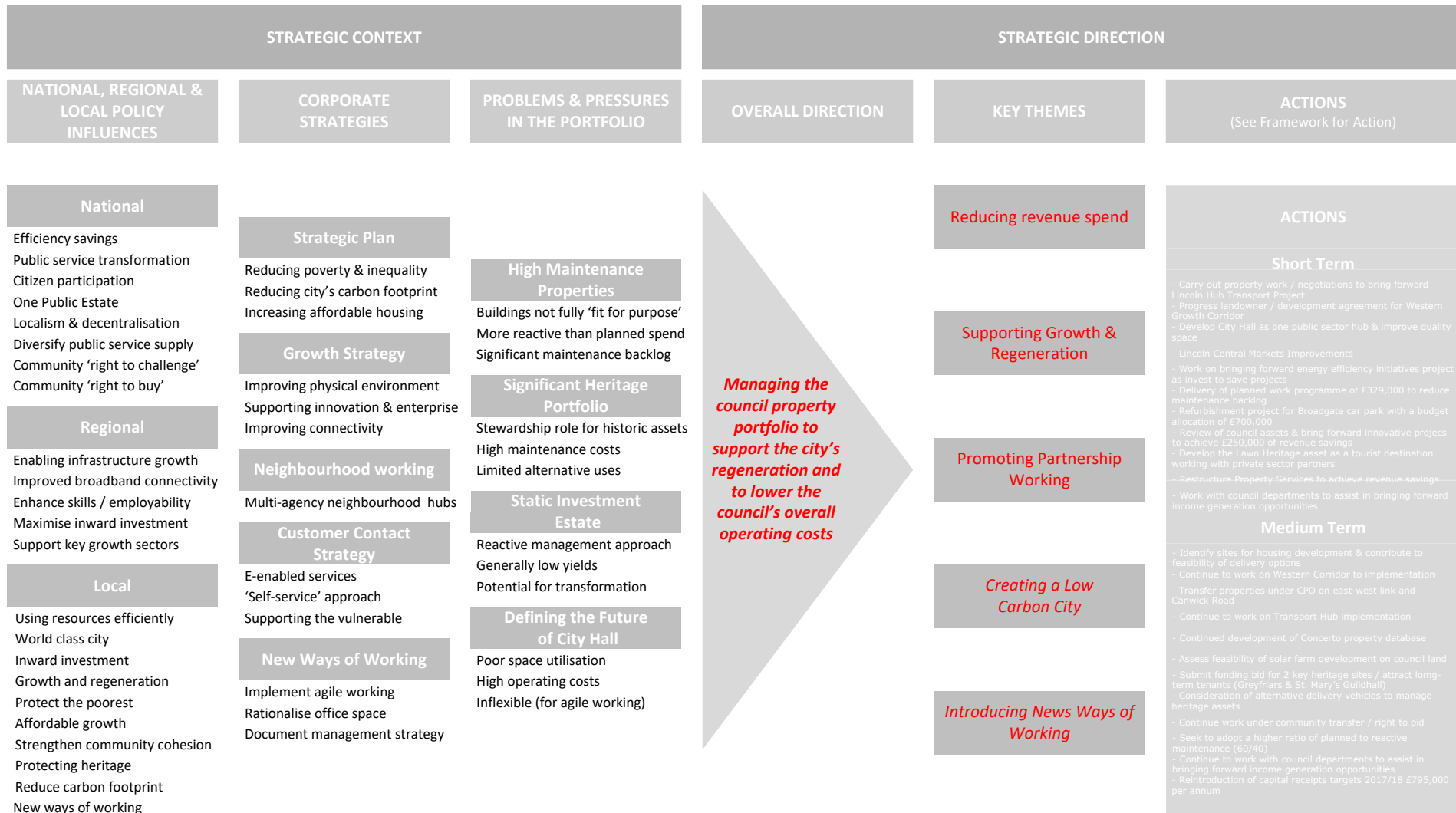
Looking forward there are a number of actions required to respond to the challenges identified above. An action plan is presented below. The resource implications and timing of these actions are not identified in any detail. Given the council's resource constraints it will need to determine the relative priority of each action, the risk of not undertaking it and the potential scale of benefits which will be delivered. It should be noted that the identified actions are over and above those associated with day to day asset management activities.

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Table 2 – A Framework for Action

KEY ACTIONS <i>(The actions identified are strategic initiatives only and are in addition to the normal day to day activities undertaken by Property Services)</i>	KEY THEMES				
	Reducing Spend/Income Generation	Supporting Growth & Regeneration	Promoting Partnership Working	Creating a Low Carbon City	Implementing New Ways of Working
SHORT TERM – (within 12 months)					
Carry out property work / negotiations to bring forward Lincoln Hub Transport Project	•	•	•	•	
Progress landowner / development agreement for Western Growth Corridor	•	•	•	•	
Develop City Hall as one public sector hub and improve the quality of space	•	•	•	•	•
Lincoln Central Market improvements	•	•	•	•	
Work on bringing forward energy efficiency initiatives project as invest to save projects	•			•	
Delivery of planned work programme of £329,000 to reduce maintenance backlog	•				
Refurbishment project for Broadgate car park with a budget allocation of £700,000	•	•			
Review of council assets & bring forward innovative projects to achieve £250,000 revenue savings	•	•			•
Develop the Lawn Heritage Asset as a tourist destination working with private sector partners	•	•	•	•	
Re-structure of Property Services to achieve revenue savings	•				
Work with council departments to assist in bringing forward income generation opportunities	•				
MEDIUM TERM – (1 to 3 years)					
Identify sites for housing development & contribute to feasibility study of delivery options		•		•	•
Continue to work on Western Growth corridor to implementation	•	•	•	•	
Transfer properties under CPO on east-west link and Canwick Road		•			
Continue to work on Transport Hub implementation	•	•	•	•	
Continued development of Concerto property database					•
Assess feasibility of solar farm development on council land				•	
Submit funding bid for 2 heritage sites / attract long-term tenants (Greyfriars & St Marys Guildhall)	•	•			
Consideration of alternative delivery vehicle to manage heritage assets	•	•			
Continue work under community transfer / right to bid		•	•		•
Seek to adopt a higher ratio of planned to reactive maintenance (60/40)	•				
Continue working with council departments to bring forward income generation opportunities	•				
Re-introduction of capital receipts target 2017/18 £795,000 per annum	•				

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Part 2 – ASSET MANAGEMENT PRACTICE

Property Vision & Objectives

Critical to effective asset management is a clearly defined vision and objectives for the property portfolio against which options can be considered and delivery plans developed. The vision and objectives also needs to be consistent with the Council’s strategic objectives. The Council recognises that, as a major landowner with a diverse portfolio of property across the city, it can contribute positively to both the delivery of its core services and the achievement of its aspirations for the future of the city as a whole. The council’s vision and objectives for property are set out below:

Table 3 – Property Vision & Objectives

Overall Vision	Key Objectives
To optimise property (and associated professional services) to support the Council’s strategic objectives for the city.	<ul style="list-style-type: none"> • To ensure buildings meet statutory requirements • To ensure buildings are safe & clean for users and staff • To use property to contribute to regeneration of the city • To promote sustainability through property • To minimise running costs for operational property • To ensure effective use of space • To ensure value for money in property services • To exploit opportunities for joint working with other public sector agencies/third sector to achieve benefits for the customer

Supporting Property Policies

This overall vision and the Corporate AMP is supported by a range of more detailed strategies, policies and procedures as identified in Appendix B.

Overall management Arrangements

The full breadth of professional property services are undertaken in-house with some selective use of external capacity and expertise as required. The Property Services Team is part of the Directorate of Resources of the Council reporting through to the Assistant Director of Finance. The team comprises 20 staff organised as three units covering building maintenance, facilities management and property services.

Appendix C provides a self-assessment of the council’s current practice against recommended ‘best practice’ in asset management (derived from Audit Commission, Government and

Professional associations). This highlights that in general terms the council is working closely to prescribed practices. An action plan has been developed as part of the service plan for Property Services to achieve full compliance.

Roles & Responsibilities

The Council's lead for asset management is undertaken by the Strategic Property Manager. This means that asset management matters are represented at a senior officer level and through the Strategic Property Manager through to the Council's senior officer management team and Member Executive. The Strategic Property Manager leads on property strategy, portfolio management and delivery of all property related services.

The council has established an Asset Management Group which comprises senior officers and members and an Asset Review Group which comprises cross-service representation. The former group has a strategic oversight of asset management matters and meets periodically (approximately on a 3 monthly basis); whereas the latter group meets monthly and has a more direct focus on reviewing the performance of individual assets within the portfolio. The Assistant Director of Finance and Strategic Property Manager sit on both groups. The full Terms of Reference for the Asset Management Group are available at Appendix D.

Decision Making & Consultation

Asset management matters are considered through the Asset Management Group which has executive decision making powers. The Leader of the Council is the lead member for asset management and hence there is a strong 'member champion' for asset management and asset management has a high profile across the council. The Leader of the Council acts as the Chair of the Asset Management Group. Informal member workshops have been held to raise awareness with members of the importance of asset management and to advise on some of the work initiatives in progress. The Strategic Property Manager also has wide delegated powers in order that day to day management can be actioned as efficiently as possible.

Identifying Property Needs

The asset needs of individual council services are considered through the relevant service delivery plans with the support of the Property Services Team. As part of these service strategies the existing assets are considered in terms of their suitability, maintenance liabilities, running cost performance and likely match with future requirements. Individual services are responsible for defining their future property needs and funding requirements although individual projects requiring capital funds are prioritised in accordance with the council's overall corporate priorities. The Strategic Property manager meets regularly with Service Departments to discuss their property requirements and give strategic advice to services.

Capital Programme Management & Prioritisation

The capital programme is directed to ensure that limited resources are invested in the most effective way to improve service delivery. The Council has a robust process for project initiation, delivery, monitoring and completion. This is described fully in Appendix E. The Capital prioritisation methodology is based on both corporate and service based priorities. As well as considering capital costs and funding, attention is also focussed on the revenue implications of any capital expenditure to ensure the Council will not inherit a legacy of increased revenue costs. Therefore, only whole life costs are considered when evaluating potential capital projects. In brief the process for gaining approval for a capital project is as follows. A project brief is submitted to the Programme Board i.e. the Strategic Plan Implementation Team (SPIT) for evaluation against an agreed set of criteria, including how well the proposal meets the strategic priorities and budget priorities, whether partnership working and external resources are available and the operational feasibility. If outline approval is granted by SPIT, the project brief is submitted to the Corporate Management Team (CMT) and then Executive for approval. This is as detailed in the Lincoln Project Management Model, which provides the approved guidance for the initiation, approval and management of all projects.

Managing Properties in Use

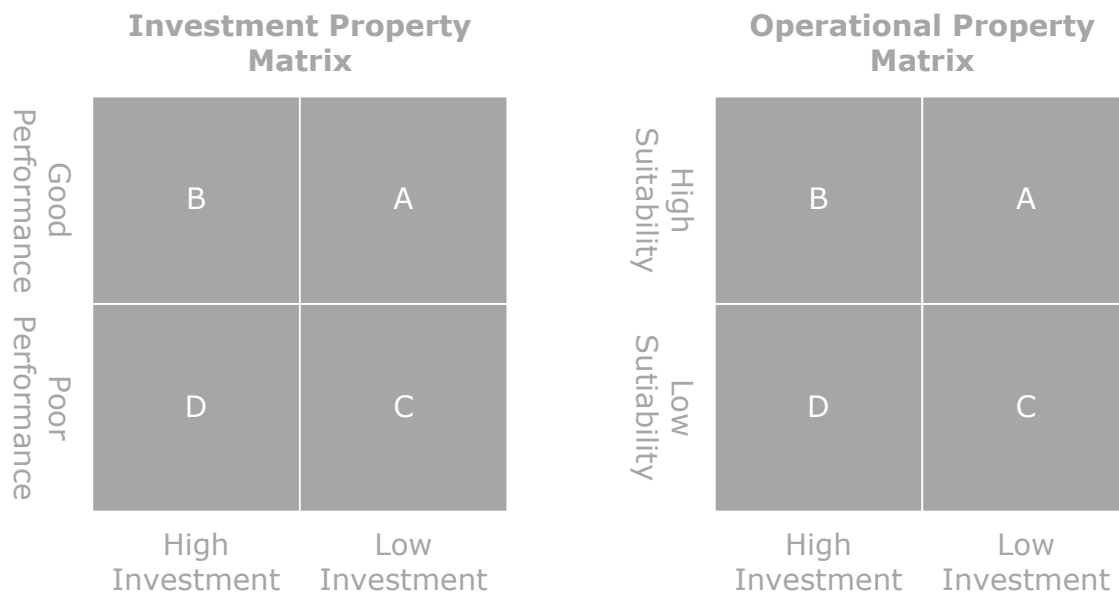
Day to day management of properties is undertaken by Property Services and the service department occupying the buildings. There is a centrally managed budget for planned and reactive maintenance. Running costs for administrative buildings (such as City Hall) are managed centrally by Property Services with running costs for other buildings devolved to nominated 'Responsible Officers'. Each building has a 'Responsible Officer' who liaises with the Property Services Team. They are given advice, training and support by Property Services.

Review of Need, Utilisation & Cost

A programme of reviews has been initiated. This includes all of the council's buildings and is used to categorise assets and inform action based on an understanding of the need for and performance of individual assets. The initial focus is on reviewing non-income generating properties and properties with a high maintenance liability with an objective to bring forward assets that can generate capital receipts. The review adopts a standard methodology with a defined data collection template which draws together all relevant property review data. The review outcomes are considered initially at the Council's Asset Review Group (officers) and subsequently reported through to the Asset Management Group (officers and members). The review is led by Property Services but undertaken in conjunction with service managers and Responsible Officers as appropriate. Simple metrics are used to classify properties as outcomes from the review and to inform action.

Diagram 2 – Approach to Asset Categorisation

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Data Management

The introduction and use of the Concerto property asset management system provides the Council with an up to date platform to support the management of the portfolio at both a strategic and operational level. Concerto is a commercial property software package with full functionality provided through application modules. This allows the diverse activities related to property to be integrated into a single corporate property database accessible to all (subject to need and access privileges) across the council. The Diary Module of Concerto is used to initiate reminders and actions for some aspects of property management.

The system holds a full range of data on all properties (although full heritage data is not currently held on Concerto). Work is in hand to improve the quality (completeness, currency and accuracy) of property information. This is essential to underpin effective asset management as the quality of decision making is critically dependant on the quality of information. Information is important in helping to identify opportunities to optimise the portfolio and its contribution to delivering the Council's objectives. Work is in progress to streamline links between Concerto and the Council's financial system (Agresso). There is also a need to review the reporting needs from the system to broaden the reporting flexibility over and above the standard management reports provided through the system.

Performance Measurement

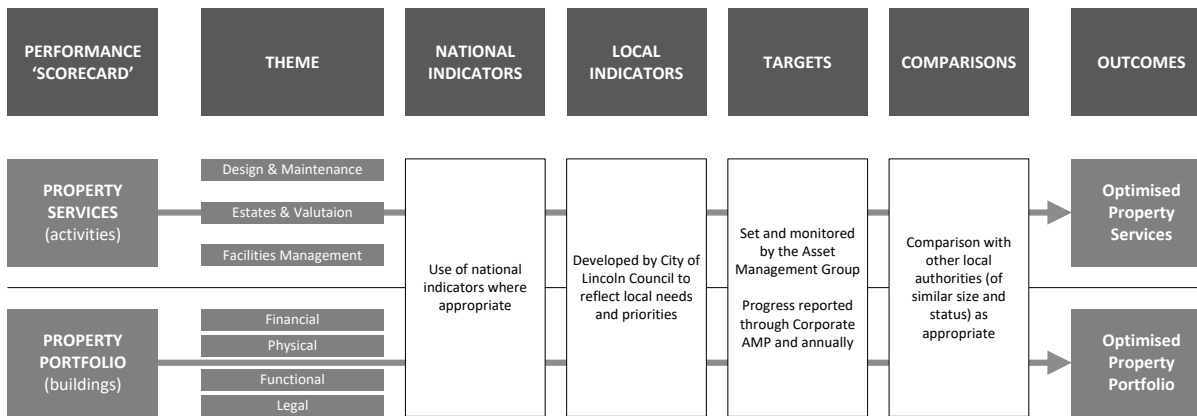
Performance indicators relating to the property service and the performance of the overall portfolio are monitored through the Council's Information Management & Performance system. The property performance indicators (pPIs) which are monitored are a combination

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of recognised national indicators and local indicators specific to the council. Annual performance is also considered at a joint CMT/Members meetings.

A simple framework for performance management has been developed as shown below. This is based on a separation between the performance of property services (activities) and the performance of the property portfolio (buildings). It is based on collection of nationally recommend indicators where appropriate plus local property performance indicators (pPis) using a simple one page 'scorecard' in each case to measure performance. Each 'scorecard' uses a small number of indicators chosen to provide a rounded view of property services and the property portfolio. The intention is to establish long term targets against which to monitor progress and to seek to compare performance with other council where possible. The framework is embryonic; will be refined in use and be developed further as the quality of property data improves.

Diagram 3 – Performance Measurement Framework



Partnership Working

The Council pro-actively seeks opportunities to develop joint-working initiatives with other bodies/third sector organisations and recognises that increasingly there will be need for an integrated approach to asset management with other third/public sector agencies so that opportunities for shared asset use, cost reduction from rationalisation and better service delivery can be exploited. Existing projects included:-

- Multi-agency community hubs at Markham House, Swift Gardens & 53 Belmont St.
- Shared accommodation with Lincoln Credit Union
- Office space tenanted by Citizens Advice Bureau

The council is increasingly embracing opportunities for collaborative asset management and asset sharing and regularly meets with other public sector agencies/private sector partners to consider asset management issues. The most recent project to deliver a new transport hub

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has involved partnership working with Network Rail, Lincolnshire County Council, Stagecoach and Lincolnshire Co-op.



PART 3 – THE PROPERTY PORTFLIO

Overview of the Portfolio

The council has a diverse property portfolio spread throughout the city's administrative area. The bulk of the estate is operational property used for direct delivery of services for which the council has a statutory or discretionary responsibility and is predominantly freehold. The broad dimensions of the portfolio (shown in the diagram overleaf) are:-

- The portfolio comprises 318 properties
- Is worth £76.14M in terms of book value
- Has running costs of £3.92M per annum which is 4.6% of the council's gross spend
- Has a repair backlog and statutory obligations requiring an investment of £28.55M

Tenure & Use

The portfolio is predominantly in freehold ownership. Leasehold buildings are a charge against the council's revenue budget and whilst they can be a flexible option over the short term there is a need to continually assess the tenure mix to ensure an appropriate balance between cost and need.

Age, Condition & Fitness for Purpose

It is important to survey and record the condition of the building stock in order to be aware of health and safety issues in the portfolio, incipient risks and liabilities to the council and the investment needs to ensure buildings are in a reasonable state of repair. The relationship between the relative levels of expenditure on reactive and preventative maintenance provides an indication of the effectiveness of an organisation's overall maintenance strategy. Annual expenditure predominantly on planned maintenance with a stable or reducing backlog trend is indicative of a well maintained portfolio, whereas a high proportion of spend on reactive maintenance suggests an inadequate budget and maintenance strategy. Currently there is recognition that the council's maintenance spend is directed more toward reactive than planned maintenance.

Buildings need to be suitable ('fit for purpose') in order to support service delivery. A building of the wrong type; in the wrong location can be a major inhibitor to effective service provision. It is important therefore to periodically review the suitability of buildings to see if they are having a beneficial or detrimental effect on services. Operational properties have been assessed for their suitability as part of review process. Maintenance priorities are determined through a rolling programme of planned maintenance surveys and through annual interviews

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with responsible officers with knowledge of on-site maintenance issues. An annual programme is then determined by the Strategic Property Manager.



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Diagram 4 – Summary of the Property Portfolio



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Value, Cost & Income

There is a recurring cost borne from the revenue budget to own and occupy property. Assuming the portfolio is fit for purpose and in a reasonable state of repair the objective should be to minimise this expenditure in order to release revenue for other council priorities. Property running costs represent 4.6% of the Council's gross annual expenditure with energy costs making up 8% of the annual property running costs. The Audit Commission estimate that property running cost for a portfolio in a reasonable state of repair should be about 8% of a council's net annual spend.

Table 4 – Property Running Costs

Running Cost Element	Expenditure (£000s)	Percentage
Rent	£962	25%
Rates	£114	3%
Water & Sewerage	£436	10%
Energy	£315	8%
Maintenance	£654	17%
Grounds Maintenance	£1,129	29%
Security & Cleaning	£228	6%
Fixtures & Fittings	£83	2%
Total	£3,920	100%

Capacity & Utilisation

It is important that the council has sufficient capacity to discharge its service responsibilities but also to ensure that space is well used as space costs money. For operational properties capacity and utilisation is examined through service strategies and property review processes which periodically challenge the need for and performance (utilisation) of operational properties. Specific focus to utilisation is given to the investment and administrative buildings. In the case of the investment portfolio the focus is about high occupancy levels. For office buildings where space is expensive to use it is about ensuring high overall occupancy levels and effective space use. With the advent of agile working organisations are targeting work-stations to staff ratios of 7:10, with 8M² per work-station and overall occupancy levels of 70% (which gives some leeway to flex according to needs). Where buildings are refurbished the target ratios are used as a guide to achieve the best use of space however, this is also dependent on service departments requirements and operating practices.

Sustainability

With the advent of carbon trading there is an imperative that the council reduces its CO₂ emissions by promoting sustainability through its property. The new carbon trading regulatory environment effectively acts as 'tax' on CO₂ use and so it is important for the council to reduce its carbon footprint. The number, type and location of buildings as well as use of energy within

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buildings can help to reduce the council's carbon footprint and act as an exemplar to other organisations to do the same. The council's main headquarters is currently has a D DEC (Display Energy Certificate) rating and there are a series of improvements planned to improve this position . The Council are able to pursue other invest to save opportunities in order to exploit its position as a significant landowner, each opportunity is considered as part of an invest to save programme and is considered based on revenue return and payback period. In respect of future developments whole life costs are considered against initial building costs in order to minimise adverse effects on the environment and climate change is actively considered as part of the project management process.

Statutory Compliance

Ensuring the portfolio confirms with statutory obligations is a high priority of the council. Failure to do so may expose council staff and clients to health and safety risks or expose the council to financial risks. The statutory obligations for the portfolio and related professional services are varied and subject to continued revision and therefore need to be monitored closely. The Council has an established framework of responsible officers for each property. A responsible officer guidance manual has been produced outlining duties and procedures and this is regularly updated and staff trained as required. The responsible officer framework is robust and has been a benefit to the Council in satisfying health and safety obligations. Contractors carrying out work on Council properties must also be registered on an approved list which ensures that satisfactory health and safety arrangements are in place. All Council staff dealing with contractors/managing buildings have successfully completed IOSH Managing Risk Safely course.

Investment Needs

Condition, statutory compliance, fitness for purpose, capacity and sustainability all contribute to the overall investment needs of the portfolio which are significant. The council has limited funds and it is important that scarce capital is allocated to optimise its benefits to the council. With a scarcity of funds there needs to be a clear mechanism to prioritise funding. Although the level of funds available will vary over time the outlook is that demand for capital investment will exceed the level of funds available and resource allocation will seek to balance policy priority alongside specific and often immediate needs. The investment strategy needs to reflect the different funding streams and recognise that a balance of spend may be required across different types of assets (investment, operational, administrative).

PART 4 – ASSET MANAGEMENT IN ACTION

The City Council takes a pragmatic, pro-active and entrepreneurial approach to managing the portfolio. In essence this means that there is recognition that individual buildings or groups of buildings, because of their specific circumstances will require different and varied solutions to ensure they are optimised in terms of their cost and performance. The need to consider a range of approaches is made more important because of the council's limited funds and competing needs for these scarce funds. The case studies in this section illustrate a range of different approaches to asset management adopted by the council.

Using Property as a catalyst for Regeneration

Property by virtue of its design, location and use can act as an important stimulus to growth and regeneration. The city council considers the portfolio has strong linkage with regeneration and seeks to leverage the opportunity and value within the portfolio to acts as a catalyst for regeneration. The Transport Hub, Tentercroft Street is a five year development project to bring forward retail development, a new bus station, pedestrian bridges and a 1000 space multi-storey car park.. The scheme will support the expansion of Lincoln City Centre in a sustainable way and provide much improved transport facilities for Lincoln residents. It will require sensitive management of development in an area of heritage significance; including the protection of views to the Cathedral.

Promoting Sustainability through Asset Management

Sustainability and reducing the city's carbon footprint is a high priority of the council. The city council is taking a pro-active approach to reducing its own carbon footprint and a part of this is concerned with 'greening' the council's building portfolio. The council is also keen to take a leadership role in promoting sustainability acting as an exemplar organisations to others in the city. There is a proposal to create a 5 Megawatt solar energy plant using a former refuse tip site which has limited opportunity for any viable alternative use. The likely capital cost is in the region of £5-10M.

Undertaking a Development Role

Councils have not traditionally taken on a developer role, leaving this largely to the private sector. However, the council is seeking to move into this area in a limited way in order to exercise greater control over development outcomes, costs and benefits. The council is considering the creation of a company structure to develop new housing outside of the HRA (Housing Revenue Account). The company could also adopt a wider development role and

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operate in sectors other than simply housing. At the moment work is at the feasibility assessment stage.

Supporting City Growth

There is a need for new houses to meet demands arising from changes in population and household formation rates. Through its asset management policies and portfolio holdings the council seeks to support the city's growth. Swanpool Urban Extension is a sustainable urban extension development for Lincoln of approximately 2,700 houses. The development would include the use of a former tip site and use of energy efficient housing. Work is in early stages of progress with capital costs yet to be determined.

Investigating Alternative Forms of Asset Ownership

Whilst the council would often prefer to retain assets in its ownership this is not always necessarily the best course of action. Increasingly resource pressures and policy direction is supporting the transfer of assets into other forms of ownership. The council takes a business-like approach to reviewing alternative ownership options to ensure that the costs and benefits are clearly understood. The council is considering the creation of a new Heritage Trust to look after and maintain key heritage properties leveraging access to external funds and with responsibility for the management of significant assets (for example Greyfriars and St. Marys Guildhall). The creation of a new company structure would be an innovative approach to the management and protection of heritage assets.

Refurbishing to Create 'Fit for Purpose' Premises

From time to time operational buildings will be in need of investment to modernise them, to bring them up to latest service standards or simple to make them 'fit for purpose'. Often the physical life of buildings exceeds their functional life and therefore periodic refurbishment can be required to ensure they remain consistent with required service needs. The Refurbishment of Broadgate car park will lead to the creation of a modern 'fit for purpose' public car park with use of latest technologies to repair damaged concrete.

Protecting Heritage Assets & Bringing them into Productive Use

Heritage assets are sometimes problematic to deal with. They can be seen as a liability with limited alternative use, functional inflexibility due to their historic nature and expensive to maintain. However the city council views its heritage assets as having significant value in terms of their contribution to creating a sense of place and the city's 'heritage economy' (inwards investment from tourism). The Lawn Lincoln has been sold subject to planning. The proposed scheme involves relocation of RW Stokes into the heart of the tourist area and other development opportunities including new tourist car parking, new restaurant and a conservatory facility. The grade 1 listed building is situated adjacent Lincoln Castle. A

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requirement is to preserve as much of the internal fabric of the property as possible and the proposed use will have minimal effect on the original structure. A Conservation management plan outlines key features of the building which should be retained.



PART 5 – MEASURING PERFORMANCE

Looking Backwards – Key Achievements

Over the last 12 months the City of Lincoln Council has demonstrated its commitment to asset management through a range of initiatives. Whilst not an exhaustive list some of the more significant achievements include:-

- A full set of condition, planning maintenance and statutory compliance surveys have been completed. This has led to the allocation of £1,028,000 of additional spend to reduce the maintenance backlog
- A full set of condition, planning maintenance and statutory compliance surveys have been completed. This has led to the allocation of £1,028,000 of additional spend to reduce the maintenance backlog
- A property review programme has been initiated which is looking at the future of all Council properties
- The Lawn Conference centre was declared surplus and placed on the open market. A conditional contract has been agreed for an alternative use.
- Major refurbishment schemes were completed at Lucy Tower and Thornbridge car parks and High Bridge
- The Council successfully implemented the change towards IFRS compliant accounts
- The Programme to complete all voluntary registration of assets was completed and Concerto database upgraded
- Achievement of 215,000 in capital receipts from property disposals

Measuring Performance of Property Services & the Property Portfolio

In order to manage the portfolio property services undertake a range of different activities. In terms of performance each of these activity needs to be considered differently and an appropriate set of indicators identified. The council has developed a simple 'scorecard' approach to this which is shown below. This will be amplified and developed further over time.

The long-term, multi-faceted nature of property as a resource means it is difficult to measure performance through a single performance measure. Property can be considered from a variety of perspectives (physical, financial and functional) and all these need to be considered

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in developing a performance measurement framework. The council is intending to develop a simple portfolio level performance 'scorecard' which concentrates on a small number of indicators chosen to provide a rounded perspective of the portfolio.

Property performance indicators are measured and updated using the Council's corporate IMPS system and performance is monitored by the Councils overview and scrutiny committee.

Table 5 – Property Performance Measures

Theme	Performance Indicators	Trend Data 2014-15
Estates	PRS 5 Percentage Occupancy levels for investment property	On target
	PRS 6 Percentage of total rent potential for investment properties	On target
Facilities Management / Maintenance	PRS 7 Percentage of all repairs completed to category on time	Improving
	PRS 8 Percentage of first time fixes	On target
	PRS 11 Level of satisfaction with the overall quality of repairs complete	On target
Capital Projects	New PI Percentage of projects completed on budget at commit to invest stage – Monitored by SPIT	
	New PI Percentage of projects completed on time as identified at commit to invest stage – Monitored by SPIT	

APPENDICES

Appendix A – Property Categories & Management Objectives

Portfolio Category	Management Priority
Operational	Fitness for purpose (Functional suitability) Running cost performance Condition (maintenance backlog)
Administrative	Running cost performance Overall utilisation Condition (maintenance backlog)
Investment	Rate of return Overall value Occupancy levels
Surplus	Development potential Interim management costs Time to disposal
Heritage	Level of risk Overall condition Access and use

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Appendix B – Supporting Property Policies & Procedures

	Portfolio Category				
	Operational	Administrative	Investment	Surplus	Heritage
Property Policies					
Asbestos Policy	●	●	●	●	●
Car Parking Strategy	●				
Community Asset Transfer Policy	○		○	○	○
Heritage Assets Strategy					○
Legionella Policy	●	●	●	●	●
Office Strategy		○			
<i>Maintenance Strategy</i>					
Procedures					
Property Review Methodology	●	●	●		●
Governance Arrangements					
Asset Management Group (Members & Officers)	●	●	●	●	●
Asset Review Group (Officers)	●	●	●	●	●
Responsible Officers	●	●	●	●	●
Lincoln Project Management Model	●	●	●	●	●

Key:

- Developed, approved and in use
- In course of preparation or to be developed

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Appendix c – Health Check against ‘Best Practice in Asset Management

Demonstrating an effective approach to asset management is important to an organisation’s overall performance. Asset management policy and practice needs to be reviewed regularly to ensure it is consistent with latest guidance and relevant to the organisation’s own priorities. As a key resource property underpins service delivery and increasingly a link is being made between effective asset management and organisational capability and reputation.

Roles & Responsibilities			Current corporate asset management plan			Running cost performance known			Statement of data needs & priorities		
The council has a designated corporate property function	1	2	2			2			2		
There is Corporate Property Officer with defined responsibilities			2			2			2		
Corporate Property Officer reports to a strategic committee			2			2			2		
Cross-service forum established on property matters			2			2			2		
Property occupiers / users role defined			2			2			2		
Group to oversee development of AM practice & AMP			2			2			2		
Cabinet member lead on property matters	1	2	2			2			2		
Decision Making & Consultation			Capital Programme Management			Review of Need, Utilisation & Cost			Performance Management		
Clearly defined decision making processes on property matters			2			3 – 5 Profile of capital receipts			Reporting on national performance indicators	1	2
Consultation process on the AMP			2			2			Portfolio performance reported to members	2	
Views of service users & occupiers sought			2			2			pPIs related to defined property objectives	1	2
Public consultation on property matters			2			2			Agreed targets for pPIs	1	2
Full member reporting			2			2			Comparisons made with others	2	
Identifying Property Needs			Managing Properties in Use			Data Management			Partnership Working		
Defined aims & objectives for asset management			2			1	2		Inventory & core data available	1	2
Strategic vision and goals			2			2			Framework for assessing action in the portfolio	1	2
						1	2		Shared use of buildings promoted	1	2
						1	2		Framework for assessing action in the portfolio	1	2
						2			Improvement plan (informed by performance data)	1	2
						2			Local pPIs in place	2	
						2			Improvement plan (informed by performance data)	1	2
						2			Integrated approach to assets with other agencies	1	2
						2			Policy on community asset transfer	2	

Based on English ‘Best Practice’

- 1 Audit Commission Key Lines of Enquiry under CPA / CAA
- 2 Wider ‘Best Practice’ (RICS, DCLG & Practitioner Associations)

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Appendix D – Terms of Reference for Asset Management Group

The Asset Management Group is a formally constituted sub-committee of the Executive operating under the usual committee protocols with the following terms of reference:

- To agree the content of the Asset Management Plan for recommendation onto Council and to receive updates on progress/actions/performance framework.
- To determine priorities within the capital planned and cyclical maintenance programmes and receive updates on progress/actions/performance framework.
- To determine the priority of property related projects.
- To determine and monitor property disposals and transactions in order to meet capital receipts and revenue targets.
- To recommend to Executive certain property disposals for decision, such as those which are contentious or have a significant value.
- To monitor and review those issues relating to sustainability and natural use of resources for corporate assets.
- To receive options appraisals and property review assessments and recommendations

The quorum for Asset Management Group is three.

The Asset Management Group shall comprise the following persons:-

- Leader of the Council
- Deputy Leader
- Portfolio Holder for Planning Policy and Economic Regeneration
- Property Services Manager
- Assistant Director (Business Development and Finance)
- Housing Asset Manager
- Assistant Director (Planning and Regeneration)
- Financial Services Manager
- Other officers of the Council to attend as and when required

Appendix E – Capital Programme Management Process

Programme Initiation

The Capital Strategy and the capital programme are updated on a rolling basis and are reported annually to Executive and Council for approval alongside the MTFS. In addition, the Council's Executive is required to approve variations to the capital programme beyond the limit delegated to the Director of Resources.

Before a new project can be included in the capital programme it must go through the five essential steps to initiate the project as defined in the Lincoln Model:

1. The project mandate – where the ideas for the project are first discussed between the project sponsor and the project manager. It provides an initial assessment of the project and a clear description of why the project is required and what it is intended to achieve in terms of benefits to the Council's corporate objectives.
2. Establishing Reporting Criteria – formal approval and subsequent monitoring will take place through the Strategic Plan Implementation Team (SPIT). Approval for all new project budgets and budget changes will follow Financial Procedure Rules.
3. Appraise Options for Delivery - in order to demonstrate that the project delivery selected is the most appropriate and the most cost-effective.
4. Develop the Project Brief, Financial Assessment and Impact Assessment - these three documents clearly define the project scope, its objectives, the resources required (including a full financial breakdown) to deliver it and its impact.
5. Obtain approval to initiate the project - Formal approval to initiate the project is agreed and signed-off between the Project Manager and the Project Sponsor.

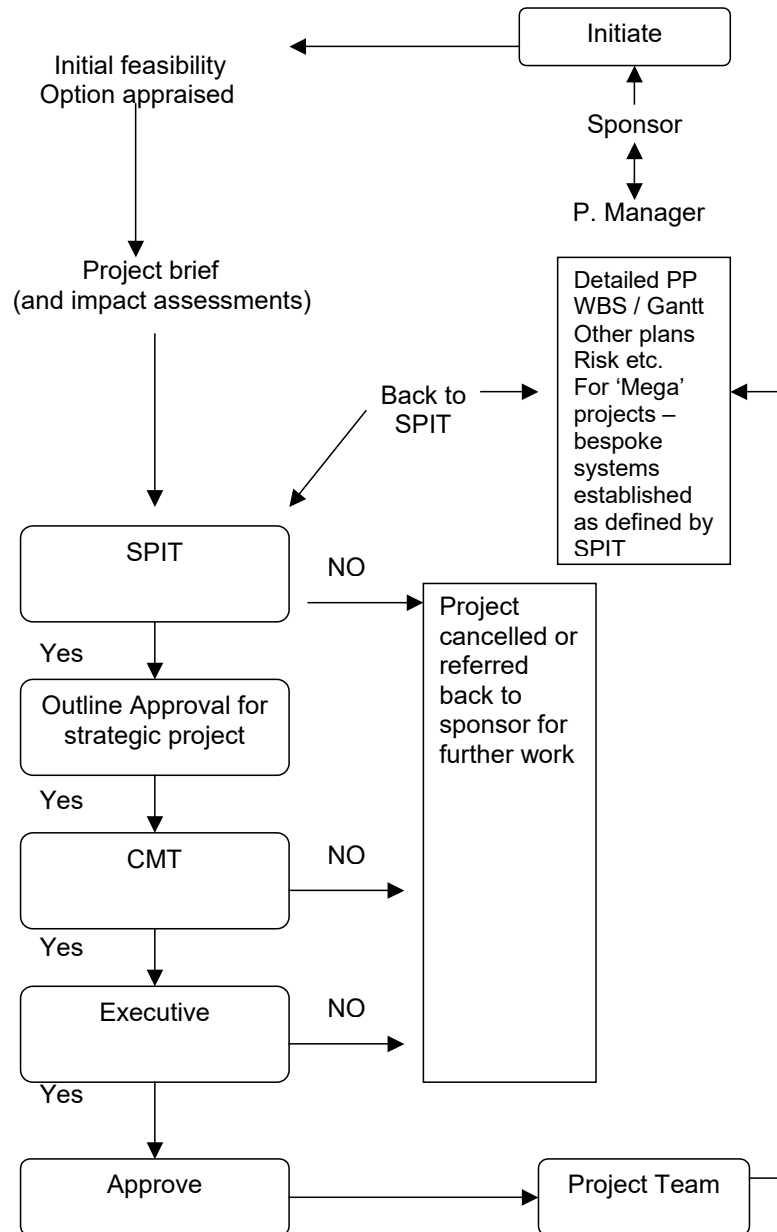
The decision to proceed will then require the approval of SPIT, CMT and the Executive. SPIT supports CMT in evaluating projects prior to approval by:

- Considering the robustness of each project brief against the corporate standards in relation to clarity of definition, establishment of measurable outcomes and overall deliverability.
- Considering the robustness of each Financial Assessment and Impact Assessment, including cost data in relation to project costs, post implementation on-going revenue costs and any consequential or related income.

Once the Executive approves a scheme the budget is included in the capital programme. The approval process is shown in the diagram below:

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Flow chart for Approving a Strategic Project



Project Delivery and Monitoring

Once included within the programme, detailed project plans for each scheme are developed by project managers and must be signed off by SPIT before they can be commenced. Each project plan includes:

- Work breakdown structure identifying key milestone dates for project delivery

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- Resource Plan - including full financial breakdown
- Responsibility Matrix
- Risk Register
- Communication plan

The completed project plans are then referred to the Strategic Plan Implementation Team (SPIT). SPIT is a sub-group of CMT, chaired by the Director of Resources. It comprises a small task group of Heads of Service (with at least one from each Directorate), the Chair of the S106 Group and technical support from the Financial Services and Policy departments. SPIT 'validates' the schemes by considering:

- The appropriateness of each work breakdown structure in relation to adequate identification of key tasks and milestones for delivery of the project.
- The appropriateness of each resourcing plan in relation to adequate identification of resources required both external to and from across the Council, together with the availability of, and commitment to provide, those external resources.
- The robustness of each project risk assessment, to ensure that all key risks have been identified and that appropriate steps can be taken to remove, mitigate or reduce them.
- Whether the robustness of the costing data provided in relation to project costs, post-implementation on-going revenue costs and any consequential or related income costs.

Once projects are validated they are included within the portfolio of capital and strategic projects monitored by SPIT. On a monthly basis, SPIT receives and considers, by exception, reports on progress against the milestones set out in each project plan/WBS, financial performance and risk levels.

SPIT will formally record variations against the agreed milestones and any amendments to the individual project plan/WBS will be made with the reason for the change together with any actions taken (or to be taken) to reduce project slippage.

SPIT will make recommendations to CMT on issues raised from the monitoring exercise with particular reference to the need for the Project Sponsor to invoke remedial action due to escalating risk. SPIT will also consider the need to report to the Executive seeking significant resource switching/re-allocation or on fundamental changes to the project initially approved.

SPIT will report quarterly to the Executive and the Performance Scrutiny Committee to enable the programme to be scrutinised by Members.

Project Completion

When a project is completed a Post Implementation Review (PIR) should be carried out. However, some projects are recurring in nature such as the capital maintenance programme or the Decent Homes programme. These still require an annual PIR.

A PIR is a formal review of the project which aims to answer the question: “Did we achieve what we set out to do ... and if not, what should be done?”

A PIR can provide valuable lessons and experience that can be used to improve and shape service delivery in the future. The Lincoln Project Model includes a robust post project review system, overseen and reviewed by SPIT, to ensure relevant information is collected and communicated to all relevant parties to enable improvement in both procurement and service provision.

At the conclusion of a project, SPIT will ensure that a PIR will be undertaken for all strategic projects. It will consider if the project:

- Met its stated aims and objectives
- Was delivered on time and within budget
- Was acceptable to the client/stakeholder and met all their specific requirements

The timing of the review will depend on when outcomes or results can be fully realised. SPIT will make recommendations on improvements that could be made to the corporate project management process based upon their monitoring experiences.