

## ASSET MANAGEMENT PLANS: ASSESSMENT CRITERIA

### NOTE OF WHERE EACH CRITERIA IS EVIDENCED

#### PRIMARY CRITERIA

<b>1. Organisational arrangements for corporate asset management</b>	<b>Para</b>
1.1 A Corporate Property Officer (CPO) has been identified with authority to undertake all required developments in asset management.	2.4
1.2 Roles and responsibilities for the CPO (as indicated by the prevailing guidance) are clearly set out, explicit and have been communicated to all those concerned, in property management and use, throughout the authority.	2.4
1.3 The CPO reports and is accountable to a strategic, decision-making group both at officer and member levels.	2.4
1.4 Clear evidence has been provided that a cross-service, senior management forum has been set up which includes the CPO, representatives from major services and, where appropriate, the finance directorate and officers involved in the development of the Capital Strategy and the Community Plan (or its equivalent).	2.6
1.5 The forum has formal terms of reference that includes the strategic management of the council's assets.	2.7
1.6 Evidence that the forum: - progresses the corporate Asset Management Plan and ensures that it is approved by senior officers and the Council; - ensures that the AMP is informed by and supports other key corporate and service plans and objectives; - meets regularly (at least twice a year or more often as may be appropriate).	2.6/2.7
<b>2. Data Management</b>	
2.1 CPO has ensured that a record is held and maintained of basic, core data on all the Council's property.	4.1
2.2 The validity of this information has been tested.	4.1
2.3 AMP can demonstrate a clear understanding of the data required to manage the performance of the property portfolio.	Section 4
2.4 Statistical information on the overall condition of the portfolio (condition categories: A-D/1-4) and maintenance backlogs is included in the AMP.	5.2
<b>3. Performance Management, Monitoring &amp; Information</b>	
3.1 The CPO submits a formal report to Members and Chief Officers at least annually on the performance of the property portfolio, which now includes performance outcomes in relation to the ODPM National pPIs.	5.1
3.2 The AMP includes information showing how the authority is performing in	5.2/5.3

relation to all five national pPIs.

3.3 Members are informed, as part of overall budget and performance monitoring, of the progress and performance of the capital programme. 5.1

#### **4. Programme and Plan Development and Implementation**

4.1 The AMP outlines the council's property related requirements and outlines the proposed programmes which are intended to meet these requirements. *(For example: acquisition, disposal, investment, development; maintenance; programmes related to surplus and/or underperforming assets; plans enabling shared use and/or co-location.)* Section 6

4.2 CPO has demonstrated that there is a methodology for option appraisal and corporate prioritising between projects. 6.2

4.3 A 3 year capital programme is developed including a forecast of the planned capital receipts. 6.1

4.4 Output/outcome targets are set for programmes and plans requiring capital investment. 6.2

#### **SECONDARY CRITERIA**

##### **Organisational arrangements for corporate asset management**

1. Evidence that the CPO / Asset Management Forum routinely challenges and reviews the use, provision and performance of the council's assets and its related property services, in order to achieve the most effective management, planning and use of these assets. Key findings and outcomes are reported to Chief Officers and the Council. Examples can include: 2.8

- the identification and rationalisation of surplus or underperforming property;
- the promotion of shared use or co-location;
- the systematic review and challenge of property use, provision and management and;
- Identification of the property implications arising from relevant plans, audits and reviews.

2. Evidence that the CPO / Asset Management Forum takes into account stakeholder satisfaction information relating to property and property services. 2.8

3. A cabinet member (or lead committee member) holds responsibilities for the authority's property resource on behalf of the council. 2.1/2.2

4. The CPO is involved in the preparation of the Capital Strategy and contributes to the work of other relevant corporate and business planning groups. 2.4/2.6

5. There are references to the property asset implications in corporate policies and strategies such as the Best Value Performance Plan, Best Value Reviews, the Capital Strategy, the Community Plan and LPSAs. 2.9/2.11

6. There is evidence of cross service use, shared use and/or co-location of 6.23

property resources within the authority and with other organisations.

### **Consultation**

- |  |         |
|--|---------|
| 7. Evidence that processes are being developed to obtain feedback from services, users and occupiers.                                  | 3.1     |
| 8. Evidence that consultation findings are used to influence the continuous improvement of property and property services performance. | 3.1-3.3 |

### **Data Management**

- |  |         |
|--|---------|
| 9. CPO has undertaken a full survey of future data requirements for the property portfolio.  | 4.4-4.5 |
| 10. CPO has identified a programme of necessary improvements   | 4.4-4.5 |
| 11. CPO has commenced development of a data system for “intermediate” data (i.e. property data which requires updating from time to time such as condition, rents and user details)  | 4.1     |
| 12. CPO has implemented Unique Property Reference number (UPRN) system or set out detailed reasons why any alternative property referencing approach is considered more appropriate. | 4.3     |
| 13. CPO has developed an approach for the centralised co-ordination of property management information and its integration with relevant council financial information.              | 4.4-4.5 |
| 14. CPO has undertaken a review of training needs for users of the data and set in place a system for satisfying those needs.  | 4.2     |

### **Performance Management, Monitoring & Information**

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|---|----------------------------|
| 15. Clear evidence that the CPO is developing and using a set of local performance measures in relation to assets that link asset use to corporate objectives.  | 5.4<br>& Appendix 2        |
| 16. Clear evidence that the CPO is developing a process to enable the comparison of the performance and competitiveness of property and property services with other similar organisations and other providers. | 5.9                        |
| 17. Clear evidence that the development of performance measures and monitoring takes into account stakeholder consultation and user satisfaction findings.  | 5.5<br>& Section 3         |
| 18. Clear evidence that performance measurement feeds into a process of continuous improvement.   | 5.10                       |
| 19. Local Performance Indicators are in place and being used for measuring and monitoring the amount of surplus property and space utilisation.   | 5.7 & 6.20<br>& Appendix 2 |
| 20. A written report is produced for Members and Chief Officers on any maintenance backlog recommending appropriate action.   | 5.11                       |
| 21. The CPO is collecting information on the “suitability” of the various   | 6.7                        |

categories of the portfolio for their current and future use.

**Programme and Plan Development and Implementation**

These criteria  
are all  
evidenced  
in section 6

22. The AMP demonstrates that the Council has identified the implications for property, which arise from the Council's objectives.

23. The AMP demonstrates service wide understanding of corporate ownership of assets.

24. The AMP demonstrates that the Council has undertaken a thorough investigation and analysis of the gaps between future requirements and the current provision and performance of the authority's present property assets.

25. The Council has identified and appraised the options for closing these gaps.

26. The AMP outlines the Council's approved 3 – 5 year strategic action plan based on this analysis.