NATIONAL ASSEMBLY FOR WALES, FINAN CE COMMITTEE

ASSET MANAGEMENT SURVEY – FEBRUARY 2013

Strategic links and leadership

1. How does asset management fit within the organisation's overall strategy?

RESPONSE: Asset Management functions at a strategic and operational level within this Council. Details are set out in the current Corporate Asset Management Plan for Property Assets 2010/2013 (CAMP). Copy attached for your reference.

2. Does the organisation have an overall asset management strategy and published plans which support the corporate objectives?

RESPONSE: The CAMP sets out the strategic framework and this plan is subject to annual review. Formal policy positions on asset related issues are developed and adopted as required. Service plans and priorities are linked to the asset management strategy through the production of annual Service Asset Management Plans (SAMPs).

      a. How does this strategy link into the capital investment strategy and wider financial planning?

RESPONSE: There are specific targets for receipts from asset disposals set out in the financial strategy. Within the CAMP there are various work streams to improve capital and revenue streams. These are reflected in financial planning.

3. Who has responsibility for leadership on asset management:

      a. At a Cabinet/Board level?

RESPONSE: The Leader of the Council has overall responsibility for property and asset management within his portfolio of responsibilities. The Deputy Leader has portfolio responsibility for Economic Development and Community Safety, including physical regeneration and redevelopment of the built environment. The Cabinet Member for Sustainable Development, Leisure and Tourism has portfolio responsibility for energy management and carbon reduction.

      b. At Executive level?

RESPONSE: The Director of Corporate Estates is the lead professional officer for

property and asset management within the executive. In discharging this function, he works closely with the Chief Executive and the Group Director – Corporate Services.

c. At Service level?

RESPONSE: Across the Council's Directorates, each service area has its own lead officer for asset management. These are either Chief Officers or representatives of Chief Officers with direct reporting lines. These representatives meet at least quarterly at the Corporate Asset Management Working Group (CAMWG) to discuss matters of mutual interest relating to asset management.

4. How are Council/Board Members engaged with property asset management and how regularly does the Council/Board review asset performance?

RESPONSE: The Cabinet members above receive regular briefings on policy and case specific issues by senior officers. These may be oral or in writing.   Briefing reports, proposed policy development and issues of a strategic nature are reported formally as circumstances dictate. Formal updating reports are tabled at least annually. Individual Ward Members are consulted on significant issues (eg a proposed disposal) affecting their Ward.

5. Is there a dedicated property division or similar? If so please detail its structure and relationship with other service divisions.

RESPONSE: There is a Corporate Estates Directory within the Council, forming part of the Corporate Service Group Directorate.   This service brings together a comprehensive range of professional property skills including strategic asset management, estates management, property maintenance and design. Having a centralised operating model helps coordination of action by reducing lines of communication and it provides economies of scale. Structure diagrams are available if required.

Communication with other service divisions takes place through a variety of mechanisms. These include formal arrangements such as the CAMWG and regular meetings with key service colleagues. In addition, there is a network of informal relationships with key managers having responsibility for property related matters such as operational site managers and budget holders.

6. Across the organisations (e.g. at Council/Board, Executive and Service level) can you demonstrate that property is utilised as a corporate resource and enabler of service provision?

RESPONSE: The CAMP is a key strategic document that sets out the asset strategy and confirms arrangements for management and utilisation of property. The position can be exemplified by a number of recent actions. Firstly, only the Director of Corporate Estates (or his deputy) can acquire or dispose of an interest in an asset. Therefore the acquisition or disposal of assets is considered from a Corporate, rather than a Service perspective. There are a range of Corporate protocols managing these processes that Service managers must adhere to if they wish to change the portfolio. In addition, all movement of services and staff between premises is arranged through the Corporate Estates Directorate and there are processes in place to ensure this occurs. It is unlikely that the level of asset sharing between services would otherwise have been achieved. Secondly, the Council has adopted and is rolling out a formal "Corporate Tenancy Agreement" (CTA) for its premises and a similar "Schools Tenancy Agreement" (STA) for its schools. Although these can not be made legally binding, they set out respective responsibilities for site managers and the Council corporately and they reinforce the asset as a corporate resource. Thirdly there are issues around budget arrangements. For example, the Council has recently centralised the management of all of the Corporate office accommodation from individual services to Corporate Estates. It is relevant also to note that any receipts from disposal of assets are absorbed into the Corporate Financial strategy and allocated according to Corporate priority. No part is retained for use by the former occupying service.

The Councils assets and asset strategy are aligned with service provision through the work plans produced through the respective SAMPs and the communication networks described above.

Systems and Processes

7. Can you demonstrate that property maintenance is supported by adequate information systems? Are these information systems used to:

RESPONSE: Yes, the main information system supporting the property maintenance activity is Technology Forge, which is supplemented by Atrium & Ramis systems.

- Benchmark performance against that of other bodies; and/or

RESPONSE: Performance is benchmarked against other authorities via the annual Consortium of Local Authorities Wales & also informally through several networking groups eg. CIPFA Property Forum, ACES, APSE, etc.

- Link with other relevant systems (e.g. geographical information systems)

RESPONSE: The system is linked to Planweb, which is the Councils GIS system

8. How often does the organisation conduct an options appraisal to ensure that the property maintenance backlog is being managed effectively?

RESPONSE: We rarely document option appraisals with regards to backlog maintenance. However, prior to obtaining Cabinet approval to embark upon an annual maintenance programme, condition criteria, operational criteria are carefully considered with the client/project team to ensure resources are directed at properties with greatest need.

a. Is there a programme of regular property reviews? If so, what do these consider and how often are they conducted?

RESPONSE: See response to question 11 below.

b. Is information on running costs and environmental impact available to the review team?

RESPONSE: Yes, operational running costs and energy performance criteria are assessed during property reviews. Attached is an example of a recent schools review to demonstrate what data is used.

9. Can you demonstrate that decisions on new capital projects and other planned works are based on a clear business case, including options appraisal and whole-life costing?

RESPONSE: Major capital projects such as new builds, extensions, major refurbs are all subject to having a clear business case together with option appraisals. However, for smaller planned maintenance works, as described in item 8a above, we work closely with the client/project team to ensure resources are directed at properties with greatest need.

10. How does the property division interact with service divisions, what are the arrangements for involvement/support?

RESPONSE: The Council has a shared corporate data base of property information and a corporate finance system for sharing information.

Liaison between service teams and the property service takes place formally through a number of mechanisms, including the production of the AMP, production of annual SAMPs for all service area and meetings of the CAMWG. In addition, informal liaison between key professional officers takes across the organisation.

Resources and value for money

11. What are the levels of resource available, at corporate level, to review property assets and running costs? Is this adequate?

RESPONSE: There is a body of information maintained on the costs associated with property assets. This may include variable operating costs (NNDR, utilities etc), condition, utilisation, asset value etc. It is the case however that periodic property review is not separately funded as an activity. Never the less, this information can be deployed in a manner that enables effective review of assets (see 12 below for an example). Currently, option appraisal and review is undertaken within general resources as circumstances dictate. Whilst this appears to operate satisfactorily, a more routine approach to property review would entail the provision of additional resources to the activity.

12. What information on the property costs of the buildings occupied by services is available to senior management, and how is this utilised by them in considering service delivery?

RESPONSE: Detailed information generally can be assembled to support service planning. By way of example see the attached document produced in support of the 21st Century Schools programme.

13. Does property maintenance have adequate resources to meet its policy objectives and is sufficient priority given to routine maintenance within the budget process?

RESPONSE: Yes, Planned, routine, cyclical maintenance is undertaken using dedicated resources earmarked within the Council to allow us to undertake statutory compliance work. However, backlog maintenance in properties continues to grow as building conditions deteriorate.

a. Is funding maintenance linked to the condition of assets?

RESPONSE: Yes, we consider condition and operational use as part of the decision to fund maintenance. We also work closely with the client/project team to ensure resources are directed at properties with greatest need.

14. Given the current climate of reducing budgets, is there any perception at corporate, or service, level that resources should be diverted directly to front-line services rather than to property management?

RESPONSE: The financial pressures on the Council impact on all services, including asset management. The property service has been asked to find budget savings as part of the corporate budget strategy. There is no perception that the

sums required are disproportionate and it is accepted that it is unlikely that additional resources are likely to be allocated to property management at this time.

Opportunities are being explored to find ways in which asset management can assist with the Corporate financial pressures. Examples include an active asset disposal programme, taking a fully commercial approach to lettings, centralising property maintenance and maintenance budgets and an "invest to save" energy efficiency programme.

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15. Can you provide examples of how the organisation works with partners to achieve economies of scale in asset management?

RESPONSE: There are a range of joint working arrangements but to take 3 examples:

- The Council is an active participant in the Cwm Taf Regional Asset Management Collaboration Board. This is a new body, formed to facilitate a coordinated approach to public sector assets within the region.

- The Council acts as lead authority for the Central South Consortium Joint Education Council. This is a consortium of 5 Local Authorities providing a shared service from a single premise.

- The Council has jointly tendered with a neighbouring Local Authority a Measured Term Contract for building and repair services.

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16. Can you please detail the framework in place to continuously review and improve the performance of property management?

RESPONSE: The formal and informal processes in place are described above.

a. Are there annual performance plans, agreed by Council/Board Members, setting clear targets for improvement?

RESPONSE: The asset strategy is set annually through the CAMP or its update. There are certain quantifiable targets set, including a sum for capital receipts, revenues from income producing assets, the level of consumption savings and reduction in Carbon emissions from the energy efficiency programme etc. The Council provides information on National Performance frameworks. Quarterly management information is considered at the Corporate Estates Directorate Management Team meetings.

b. Does the organisation include this information in public performance reporting?

RESPONSE: Only as reported nationally through national benchmarking organisations such as CLAW etc.

Guidance and good practice

17. What if any, guidance is adhered to in conducting asset management in the organisation?

RESPONSE: The Council is mindful of published guidance but has developed a strategic approach to meet the needs of RCT.

18. Do you share good practice and lessons learned on asset management with other organisations/professional bodies, and if so, via what mechanisms?

RESPONSE: The Council participates in various national bodies and professional organisations concerned with aspects of asset and property management. In addition, officers have informal networks of colleagues with whom they liaise and share experience.

19. Would a central source of expertise and good practice be beneficial to the Welsh public sector, and if so where should this sit?

RESPONSE: There is a significant body of information available already and organisations exist that have the brief of sharing good practice (eg CLAW, CAPE and ACES). Care would be required in establishing another data source, to ensure it does not duplicate material available already.

a. Would training in property/asset management be beneficial?

RESPONSE: There is training available currently through professional bodies and commercial providers. If however, there was a cost effective, local training opportunity, this would be of interest. As ever, cost and quality would be crucial

20. Would the drive to improve asset management benefit from a repeat of the Wales Audit Office's 2010 report on buildings management?

RESPONSE: The previous exercise required significant time commitment. It would be necessary to establish clearly the purpose and outcomes before committing to support a repeat of this exercise.

Rhondda Cynon Taf County Borough Council

Corporate Asset Management Plan

for Property Assets

2010 – 2013

**Prepared by: The Corporate Asset Management Team
Author: Director of Corporate Estates**

STRONG HERITAGE | STRONG FUTURE
RHONDDA CYNON TAF
TREFTADAETH GADARN | DYFODOL SICR

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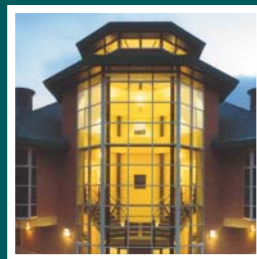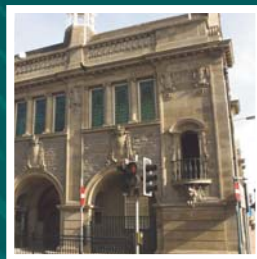
Foreword

I am pleased to introduce this Corporate Asset Management Plan as part of my portfolio responsibilities, which defines how the Council manages, maintains, acquires and disposes of its property assets. Good asset management is crucial in providing high quality, cost effective services and is a key component in achieving best value in service delivery. Without suitable, well-located premises, it would not be possible to provide many of the services upon which residents of Rhondda Cynon Taf rely.

Owning property assets, however, is not without financial cost. After staff, the Council spends more on running and operating its premises than any other asset type. In addition, the capital value of the property portfolio is calculated in the accounts at £500M.

Most commentators anticipate that the economic conditions will remain extremely challenging over the next 5 years at least. This is reflecting in policy of Central Government and WAG, both of which are forecasting lower budget settlements for Local Government over the short to medium term. These circumstances will impact on all aspects of RCT's activity, including its property portfolio.

Within the portfolio there are a number of issues that need to be addressed. Some are historic legacies such as the flexibility of the portfolio to adapt to meet modern requirements and the need to resolve historic maintenance works. Some challenges are due to current issues such as policy development, new service standards, the need for carbon reduction and changes in technology.

It is essential, therefore, that property assets are managed actively to ensure that they make a positive contribution to the delivery of services and offer good value for the resources that are invested each year. This plan sets out the policy strategy for the management of the property portfolio for the period 2010 to 2013. I will continue to work closely with the community, partner organisations, elected members and officers to ensure the Council maximises the benefit it derives from the use of its property assets.

Councillor A Christopher
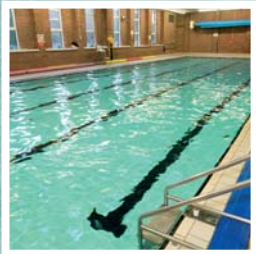**Deputy Leader of the Council**

Rhondda Cynon Taf County Borough Council
Corporate Asset Management Plan
for Property Assets

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1. Introduction

This document comprises the Corporate Asset Management Plan for Property Assets (AMP) for the period 2010/11 to 2012/13.

The AMP provides a strategic overview of the Council's three-year plan for its property assets, which include all land and buildings, owned or leased by the Council, with the exception of infrastructure assets. It comprises part of the strategic framework of the Council and therefore should be read alongside the financial strategy and the Corporate Plan.

Detailed in this Plan is the Council's approach to asset management both at a corporate and at a service level. This plan provides:

- An overview of the corporate priorities, linking these to the corporate AMP work plan.
- Details of the extent and nature of the Council's current asset portfolio.
- Consideration of service delivery and accommodation needs that are critical to the delivery of the Council's corporate objectives.
- An outline of future property needs and changes that will be made.

The plan includes a detailed work plan for 2010/11. It is, however, a living document that will be challenged and updated annually to ensure it retains direct links to other Council key plans and strategies including the 3 year Capital Programme and Service Asset Management Plans.

1.1 The AMP as a Strategic Document

Figure 1 overleaf illustrates how the approach to managing land and property issues fits within the Council's planning framework in order to ensure that it contributes to the achievement of Corporate Priorities.

Rhondda Cynon Taf County Borough Council
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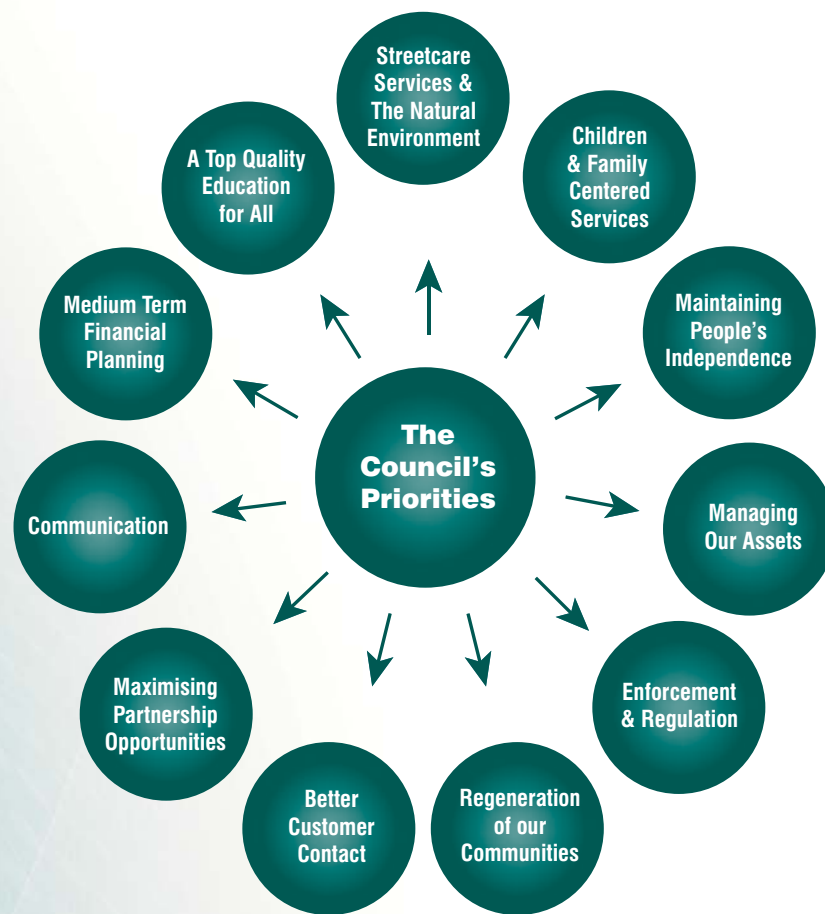
Figure 1 – The Council's Priorities

The 2009 Improvement Plan highlights the need to focus on the 11 Council Improvement Priorities. Among these priorities is Managing our Assets Action Plan, which has been amended to exclusively focus on land and property. It is clear, however, that the other 10 Priorities for Improvement each have a property dimension. If the potential for improvement in these areas is to be realised fully, the improvement strategy must have proper regard to property assets and the AMP reflect fully priorities for Improvement. Direct links between the Corporate Priorities for Improvement and the AMP work plan are stated at Appendix B.

As an Authority we are seeking to deliver sustainable services by working in a better, more efficient way. However, internal changes continue to be necessary in order for the Council to be prepared for the future. These changes will require the Council to rationalise the number of buildings currently occupied, improve the quality of the buildings that remain and ensure occupancy is optimised.

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1.2 Previous Strategic Actions

Previous Asset Management Plans made good progress in many areas, with centralisation of services, overall service improvement, office rationalisation and the land review. Key Corporate actions include the following.

- There has been investment in new corporate asset database software, Technology Forge.
- The introduction of the Corporate Tenancy Agreement for all building managers to provide a minimum standard of service.
- The Corporate Asset Management Working Group (CAMWG) was set up 07/08 to discuss property issues from a corporate perspective. This Group has cross organisation representation and is well attended demonstrating the continuing commitment to the AMP. See appendix A
- Strategies have been developed for the Council's office accommodation, Community Services assets and education with schools.

1.3 Key Priorities

Whilst the range of actions set out in this document are very wide and detailed, there are two priority issues to address over the plan period. These are as follows.

Firstly to ensure access to suitable accommodation at the right locations, minimising surplus land/property and ensuring core property is flexible to meet the changing demands of service provision, leasing in buildings to meet short-term needs.

Secondly to develop and maintain the framework of Service Asset Management Planning and an integrated property information system in order to facilitate an ambitious property strategy that meets the requirements of the Council over the next three years. This will also assist implementation of a managed centralised operational land and property strategy.

1.4 Linking Property and Service Planning

Asset Management remains a Council priority and the service will be key in securing other service improvements e.g. rationalisation of schools, community assets and the corporate estate.

Service Asset Management Plans (SAMP) provides a key strategic link between service planning and management of assets. All future SAMPs will be in a consistent format and will provide meaningful data to assist with the on going updating of the Asset Management Plan.

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The AMP will be subject to constant review and the work plan will be updated annually. This will ensure that the Council maintains a strategic up to date approach to the management of its assets.

To deliver the key objectives of the Asset Management Plan there are determined Milestones identifying actions that are required and these are set out in Appendix B.

1.5 Role of the AMP

The following figure shows how Strategic Asset Management supports and links with both the Corporate Strategy of the Council and Operational Service Planning.

Figure 2 – Asset Management Strategy Planning

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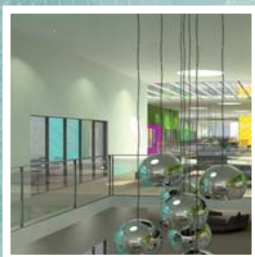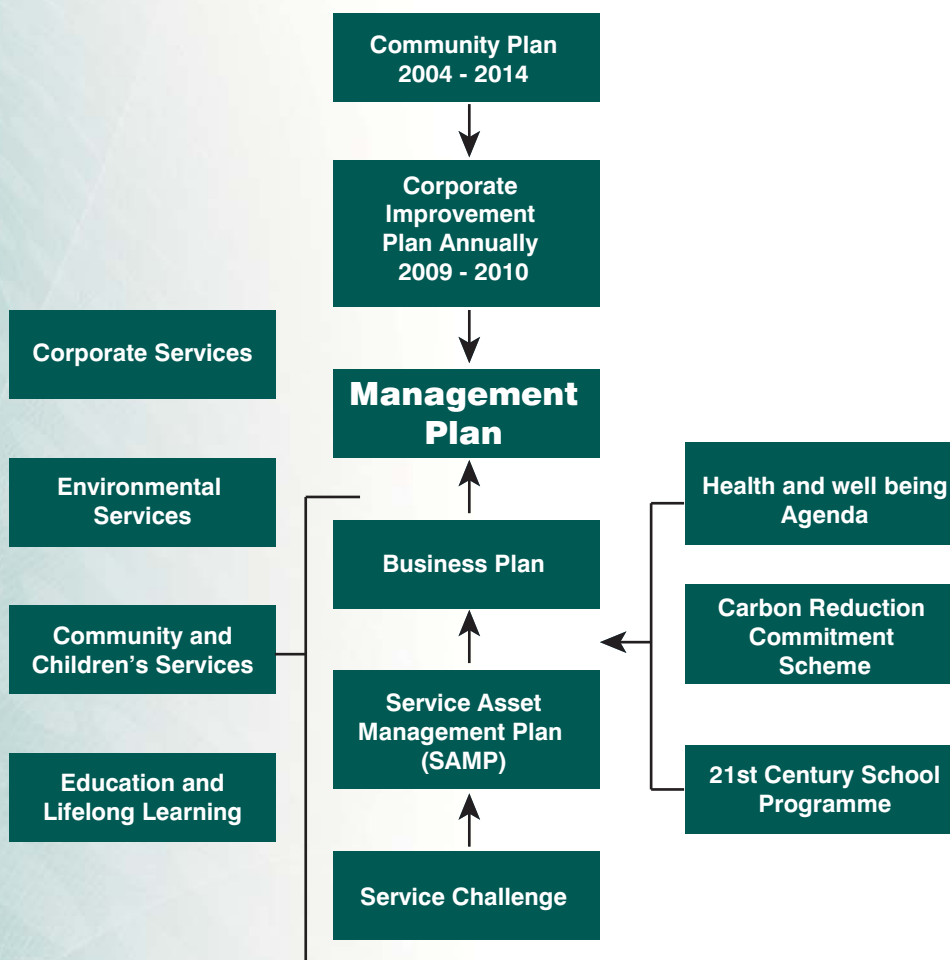
2. Service Asset Management Plans

2.1 Production of SAMPs

SAMPs can be seen as having three main purposes:
- Define the property required to deliver service objectives.
- Compare requirements to the current portfolio, and
- Identify key areas for change over the life of the plan

In the preparation of the Council's AMP, all Service Groups are required to define their property asset requirements in the form of a Service Asset Management Plan.

There are four divisional SAMPS that inform the Corporate Asset Management Plan:
- Corporate Services
- Education & Life Long Learning
- Community and Children's Services
- Environmental Services

It is intended to continue to undertake annual consultation with stakeholders and reflect views in an annual SAMP update. An overview of the process will be provided through the Corporate Asset Management Working Group quarterly meetings.

2.2 Output from SAMPs

Each Service Groups' SAMP provides an overview and condition of their property portfolio and highlights property requirements.
The SAMPs identify the following main categories of accommodation.
- Public Facing Customer Access sites,
- Non-public office accommodation /processing sites and
- Non-public service delivery sites e.g. depots etc

This process should identify whether buildings being used to deliver services are fit for purpose in terms of suitability, condition, capacity, utilisation, environmental impact and running costs. Initial outputs from the Service Asset Management process have identified a number of areas for consideration. These include:
- It has been identified that some services are reviewing their accommodation where there is opportunity for service growth, also looking at location and accessibility of accommodation to service users.
- Accommodation to support Customer Access through consolidated accommodation is a theme. In terms of physical access the benefits to customers of co-located services at the Council's One4aLL Centres have been evident and opportunities for closer alignment of services continue, building upon positive relationships with the Registrar and Library services.

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The co-location between the Council and the LHB at the Ty Elai Contact Centre will be further expanded to maximise the asset (using WAG funding), to ensure the site effectively supports further Health and Social Care joined up working plans.

- Across the Council, service groups have identified a common issue that of a lack of storage for archive files which will need to be retained for a length of time regulated by legal requirements.

- Essential refurbishment and improvements to the older establishments within Community and Children Services portfolio, to conform to Welsh Care Standards and current health and safety legislation. Where identified as part of the refurbishment there will be a requirement to remove asbestos.

- It has been identified that Community Services require additional office accommodation in the Cynon Valley due to internal service realignment.

- In line with Council's policy, it is the intention to continue the planned rationalisation of leasehold properties wherever feasible.

- Environmental Services have acknowledged that some of their portfolio requires additional maintenance to bring them up to required standard.

- The School Organisation and Planning Service of the Education Directorate directly support the overall aims and responsibilities of the Council in respect of the planning and organisation of schools, school places and asset management.

It is intended to develop responses to these service issues through the life of the AMP, subject to funding strategies being available.

These areas for action are considered in further detail below at Section 9.

3. Stakeholder Views

3.1 Existing Feedback

Rhondda Cynon Taf policy is to involve all stakeholders where appropriate during the formulation of its AMP.

Corporately the quarterly meetings of the Corporate Asset Management Working Group have provided the ideal forum in which to consult with key stakeholders.

It is considered appropriate for respective service groups to consult with the users of their service (both staff and public), regarding their satisfaction with the location and physical quality of buildings etc.

The process of engaging with stakeholders is to support the service objectives of the Council as set out in the Community Plan.

3.2 Future Consultation

Understanding the requirements and expectations of the whole range of stakeholders and service users is key to the delivery of services.

All of the service groups acknowledge that there is a need to extend the consultation to include comments from all stakeholders in their next SAMPs rather than just from a representative selection.

This is essential in creating fit for purpose assets that meet the needs of users and also gain user/stakeholder commitment to any change processes required to improve service delivery.

Extending the consultations with stakeholders to be included on agenda for this year's CAMWG meetings.

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4. Performance and Condition of the Existing Portfolio

The Council delivers its services through a variety of premises throughout the County Borough. The classes are listed as follows.

Table 1 - Asset Classes

Asset Class	Quantity
Operational	527
Investment Properties	3
Non-Operational (Surplus awaiting Sale / Off hire)	22
Other land & buildings	1263

4.1 Operational Property

There are a number that are the subject to leasehold tenures.

All of the information on the leases is held centrally in the asset register database, which is maintained by Corporate Estates.

Responsibility to manage specific operational premises rests with the respective Service Departments.

4.2 Non-Operational Property

The Council's non-operational properties, which are held as investments, consist mainly of office incubation space for new enterprises, conference facilities and a Craft & Design Centre with resident craft workers.

During the life of the plan there will be a need to review the non-operational portfolio to determine the investment returns. Some of these properties are linked to claw back due to grant funding acquired from the Welsh Assembly Government, which could have an impact on the frequency of the reviews. See Workplan at Appendix B.

Responsibility to manage non-operational property rests with Corporate Estates.

FIN(4) AM 12
Inquiry into Asset Management Survey
Response from Rhondda Cynon Taff

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4.3 Heritage Assets

The Council defines its heritage assets as buildings that are listed, situated within a conservation area or registered as a park. This also includes bridges, monuments and structures etc.

The Council's Conservation Officer seeks to ensure that the properties are maintained in accordance with the Listed Status and the requirements of the Planning Officer. The level of resource available however makes this a challenging process.

All information on these assets is held within the Council's central asset management database.

As these are specialist premises in style and administration, responsibility rests with the Museums and Heritage Team.

4.4 Surplus Premises

Land Review Programme

The Corporate Capital Strategy has set explicate targets for receipts from asset disposals over the medium term.

The Council has a live project seeking to identify disposal of unused or underused land assets, the receipts from which will be utilised to support the Council's capital programme.

In support of the objective of 'realising' higher levels of capital receipts the Land Review Programme provides a more 'holistic' approach to land management and disposal. This is to identify regeneration opportunities for the enhancement of the County.

From the commencement of Financial Year 2010/2011 the Land Review Team will continue to analyse the categories of data (contained in the electronic terrier) of the land and surplus assets records, that when concluded, will complete the land review exercise. See Workplan at Appendix B.

Disposal

Surplus land and buildings identified by the Land Review Programme are passed to the Disposal Team to be sold. Most of the surplus sites are sold by auction, either nationally or locally, which has proved to be an effective method of realising a capital receipt quickly. Other sites are sold by private treaty using a sealed bids procedure. In special circumstances direct negotiations and sales take place with adjoining owners or public bodies such as Housing Associations and the Health Board where their aims support those of the Council's Community Plan.

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Major projects such as the redevelopment of the Lady Windsor Colliery site at Ynysybwl and proposals in respect of the former Cwm Colliery site in Upper Church Village are being dealt with in close liaison with other departments of the Council and the Welsh Assembly Government as they are identified as Strategic Sites and are the subject of Welsh Assembly clawback.

Current disposals on which sales have been agreed include the Former Coedylan Lower Comprehensive School, a site on High Street in Hirwaun for the redevelopment of a new health facility by the Local Health Board and Millfield Depot site in Pontypridd. Other recently completed disposals include Ashgrove House, Pontypridd and Llwycoed Youth Centre.

The total gross capital receipts raised from disposals in the last three years is £14 million shown as:

Table 2 – Net Capital Receipts from Asset Sales

Year	Aggregate Receipts
2007/2008	£10,066,440
2008/2009	£1,466,352
2009/2010	£786,470
Total	£12,319,262

Targets in the adopted Capital Strategy are:

Table 3 – Targets within the Corporate Capital Programme

Year	Target Receipts
2010/11	£2,448,000
2011/12	£2,448,000
2012/13	£2,448,000
Total	£7,344,000
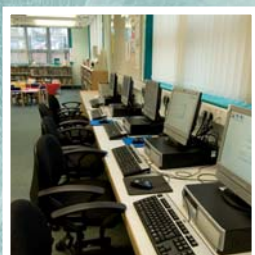
Due to the recent fall in the property market many sites are being held in abeyance pending signs of recovery, which is having the effect of delaying a number of receipts from being realised.

4.5 Performance Management

The Consortium of Local Authorities in Wales together with the Government Data Unit Wales and the Welsh Assembly Government have been consulting over the past few years on a new performance management framework for Asset Management Planning in Wales.

Asset Management measures continue to feature within the 2010-11 Performance Measurement Framework for local authorities in Wales. In addition, the Council continues to monitor its performance through a suite of local indicators.

Details are set out Appendix E.

4.6 Analysis of Condition of the Portfolio

Education and Lifelong Learning Portfolio

The present analysis shows that 62% of the portfolio is in condition A or B (see appendix E). This is due to a variety of factors, including the age of the stock (see Figure 3)

The previous backlog maintenance estimate of £73,004,971 has been improved with investment in new capital builds and extensive remodelling works thus releasing some of our poorest building stock from the portfolio with significant maintenance defects.

Figure 3 – School Premises – Construction Period

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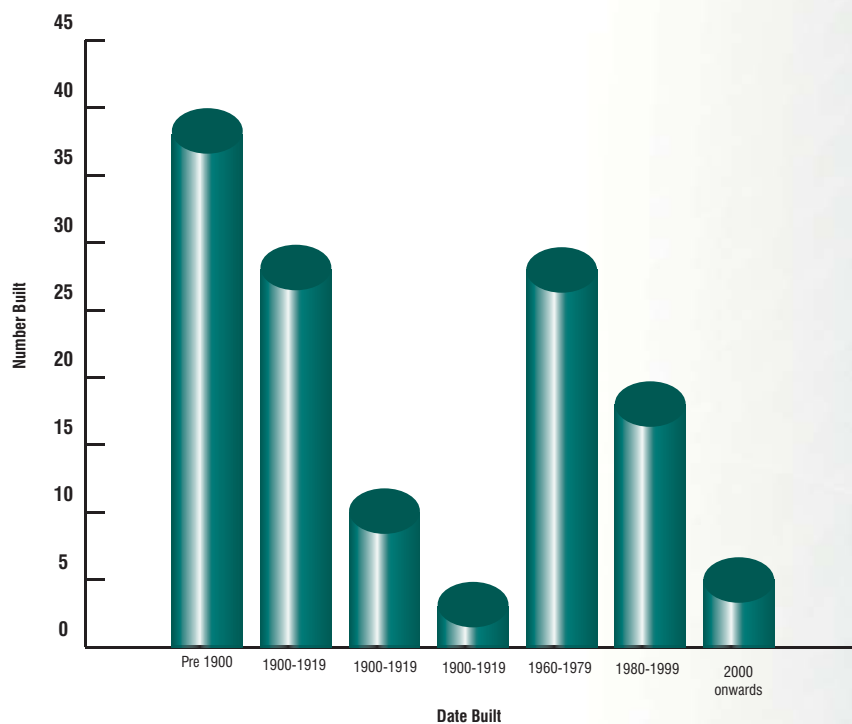
Despite recent investment, the backlog of maintenance in schools at present stands at £62M which greatly exceeds available resources. The present level of funding only allows repairs to ensure that premises are 'safe, watertight and warm'. Therefore further investment is required to improve our premises to at least bring them up to either an A or B rating.

In order to improve current information new property condition surveys are being arranged over a rolling programme of a five-year period of investment. This information will allow targeted expenditure to meet identified deficiencies, improve standards, provide lifetime cost savings and long term viability of buildings.

Over the past 10 years Capital have been invested in partnership with the Welsh Assembly Government to address major schemes. There is a need to sustain this level of funding in order to make a significant difference to the quality of education premises.

The Groups' portfolio includes not just schools, but libraries, youth/adult education centres, museums and the Rhondda Heritage Park, all of which need considerable investment to tackle the deteriorating condition of the properties.

Operational Property (Non-Education)

Based on the surveys completed, 78% of the properties are in categories A or B, i.e. properties that are in an acceptable standard or above. (See Appendix E)

The present level of backlog maintenance excluding schools stands at £19M. This figure is not being reduced quickly as the present level of funding (both Capital and Revenue) is used to target highest priorities on outstanding maintenance issues.

The Corporate Maintenance Policy, Strategy and Procedures have been standardised in an effort to provide better value/consistency across the Council.

The Council's joint procurement strategy has shown reduced costs in maintenance works. As an example, the Measured Term Contract for non housing buildings maintenance (MTC) has recently reduced costs by approximately 7% within the 4 year term contract period. There are further maintenance contracts being procured in a similar manner.

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5. Data Management

5.1 The Property Portfolio

Rhondda Cynon Taf covers an area of the South Wales Valleys stretching from the Brecon Beacons in the north, to the outskirts of Cardiff in the south. It comprises a mixture of urban, semi-suburban and rural communities, situated in mountains and lowland farmland

It is the second largest Local Authority in Wales, formed in 1996 from the former Boroughs of Rhondda, Cynon Valley and Taff Ely (part). The County Borough covers an area of 424 square miles with a population of 231,946 (2001). The area has 75 electoral wards, of which 22 are Communities First Areas. Strategic highway links with the wider region are provided by the M4, A470 and A465. A range of bus and rail services provides public transportation links with the region.

The land and property portfolio held by the Council comprises approximately 1819 sites and 1119 buildings with a portfolio's value within the accounts of £503M as at 31st March 2009. See Appendix C.

5.2 Core Data

Access to appropriate and accurate data is critical to effective asset management. Significant progress has been made over recent years to procure, assemble and organise property information by both property professionals and service managers. It should be acknowledged, however, that the process is not complete. Further investment of resources will be required if a fully comprehensive database is to be assembled.

In summary, the data currently within the Corporate system is as follows:

Table 4: Data held within the Corporate Asset Management Database

Property Register	Fully recorded as text and graphically
Tenure (Freehold/ Leasehold etc)	Fully recorded as text
Major Terms and Restrictions	All information available within Corporate Database or Legal record
Condition Surveys	Completed surveys are accessed via document link. To date 11% of surveys have been completed
Access Audits	100% of 190 sample properties completed
Suitability and Sufficiency Assessment	Education retains separate record. Corporately collected as part of SAMPs
Revenue Running Costs	Recorded as text when required for reporting purposes
OMV	Produced and updated as required
Occupancy	Produce yearly space audit of office accommodation.

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In order to continue to develop the Corporate Database further, works are planned for 2010/11 as set out at Appendix B.

5.3 Maintaining the Data

The Council's property data is recorded on an asset management system, designed to retain all forms of property data at a central location. This is in accordance with the Chartered Institute of Public Finance and Accountancy (CIPFA) and with Internal and External Audit requirements.

The register is regularly monitored and updated to record all acquisitions and disposals. The Asset Register Officer retains responsibility for the management of the register.

The following projects are underway:
- To record all Legal Completion Statements for Acquisitions, Disposals and Lettings from April 1996. This is an on going process and will continue to be monitored on a quarterly basis by the Property Information and Asset Register Officer.
- To allocate residual land to appropriate Service Groups following the Housing Stock Transfer. This project is to be completed by end of December 2010, with progress being reported on a quarterly basis by the Property Information and Asset Register Officer.

5.4 Land Registration

A project is underway to register all Council owned property assets at the Land Registry. This is being undertaken in compliance with the government's e-conveyancing initiative to achieve full registration of all Council held land by 2012. Once completed this also will address the problems arising from unregistered title such as adverse possession claims.

The registered titles showing boundaries and details will be stored on the Council's Terrier System with relevant information also being added to the central asset management system.

This project is programmed to be completed by April 2012, with progress being reported on a quarterly basis by the Property Information and Asset Register Officer. (See Appendix B)

5.5 Asset Management Software

One of CAMWG key objectives over recent years has been to develop a fully integrated asset management database, enabling the production of timely and accurate asset management data. To meet this objective in 2008 RCT invested in a new asset management system called "Facility" from Technology Forge.

To date a total of 1819 sites (Level 1) and their associated 1119 buildings (Level 2) have been entered on to the system. Where it is available, the buildings have been linked to their CAD to create the blocks and rooms (Levels 3 & 4) that make up each building. Work is now under way to collate, enter and attach related information, such as photographs, condition surveys and deeds, to each asset. During 2009/10 Property Officers have worked closely with Finance Colleagues to transfer valuation data into Facility in readiness for the new asset revaluation which began in April 2010. From that date Facility will be the Corporate valuation system.

A 'web enabled' version of Facility has been procured to allow remote 'read only' access. The system will enable officers with responsibility for building management (such as heads of schools, office managers and service directors) to access the system. During 2010 it is intended to start rolling out this to small 'groups' of users to assess how the users will seek to use the system and what data users want to access. This will allow us to set the system up as the users require and ensure that relevant data is linked and accessible where possible.

Further projects include looking at linking Facility with other systems such as the Energy system to allow the sharing of data and investigating the possibility of purchasing and developing a module for KPI's. See Appendix B.

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Inquiry into Asset Management Survey
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6. Property Management

6.1 Corporate Tenancy Agreement

In 2007/08 the Council introduced a system of 'Corporate Tenancy Agreements' (CTA) for its operational properties, in order to clarify the respective property responsibilities of the corporate centre and the internal building occupier.

CTA is a short document in a formal style, signed by the 'corporate landlord' and the internal occupier. The CTA has no formal legal status, as both 'landlord' and 'tenant' (occupier) are the same organisation. It does however have considerable practical significance as the document clearly sets out responsibilities for repairs, servicing appliances, utilities etc.

This system was successfully implemented in 2008/09 for the office portfolio, and 2009/10 will see the system rolled out further within the operational portfolio, beginning with schools / education buildings.

The CTA has been recognised by The Wales Audit Office as good practice and has been included on The Wales Audit web based Good Practice Guide to Buildings Management as part of their Asset Management programme.

6.2 Asset Revaluation

Periodic asset revaluation is a requirement of Accounting Regulations. In outline, all Public Bodies must undertake a revaluation of their land and property assets (including Council houses) at least every five years.

The main purpose of the revaluation is to ensure that the Council's assets reflect an accurate value of the portfolio and comply with appropriate accounting regulations. In addition however, the process provides opportunity to reflect on the strategy and value of key assets.

The revaluation exercise will also include a valuation for insurance purposes in order to ensure Council premises have adequate cover.

The revaluation exercise is being undertaken by external advisors over a period of three financial years with one third of the Council's portfolio being revalued in each of the three financial years. The programme commenced in April 2010.

In addition to the programmed revaluation, the advisors will also be required to revalue certain properties, which are deemed by the Council to have increased in value in any financial year as a result of capital works or which have suffered any impairment.

The workplan for this project is set out at Appendix B.

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6.3 Condition Surveys

These are physical building inspections of elements, undertaken by technical professionals, identifying maintenance requirements, cost liability and priority/urgency of addressing any maintenance issues that are identified as part of the inspection process. The condition survey assists in the preparation of planned programmes of work in each financial year. The condition survey project identifies the maintenance requirements over a 5 year cycle, at which time a further survey should be undertaken to ensure the accuracy of the information gathered.

The present situation is that approximately 11% of the Council's portfolio has a current detailed condition survey. It can be seen from the current situation that the surveys coverage is not as comprehensive as would be hoped to assist management of the estate. It should be noted that the current portfolio equates to approx 702 buildings, excluding schools this indicates that more that 140 buildings would need to be surveyed annually. From past experience the average survey takes approximately 5/6 days with the larger buildings taking in excess of 12 days to complete surveys.

Year 2010/11 will see further progress in carrying out condition surveys with the Education portfolio providing a focus.

The Workplan for this project is set out at Appendix B.

6.4 Management of Asbestos and Legionella

This activity will provide assurance that the Council is fulfilling its statutory obligation to identify, manage and assess the hazards and risks associated with both Asbestos and Legionella. Remedial measures and recommendations are addressed on a priority basis resulting from survey/servicing process.

Achievements to date include:
- Building surveys to establish presence of hazards such as asbestos contained material and water storage system risk
- Assessment of hazard in buildings – categorising of High, Medium and Low risk
- Issue Asbestos Management Plans and Legionella Log Books
- Provision of prioritised programme of works to address risk

During 2010/11 the Council has been charged to deliver a major initiative by providing the lead role for a joint working initiative with the Welsh Purchasing Consortium, Construction Group. The procurement of Legionella/Water Hygiene related Contract, will provide compliance with current E.U. procurement guidelines and statutory requirements.

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It is intended that 'hazard' information in relation to asbestos will be captured in the asset management system for all new surveys. This information will assist the Council in assessing building stock condition and future maintenance requirements, which will feed into the Council's planned maintenance programmes.

Key actions for 2010/2011 are set out in Appendix B

6.5 Energy and Water Management

The responsibility for coordination and advice on Energy Management lies with the Corporate Estates Team. It is administered by the dedicated Energy/Water Manager and is delivered operationally by the team. The role of the team is to effectively manage energy and water efficiently, to secure value for money and ensure prudent use of our resources.
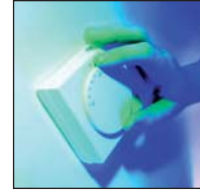
Key actions for 2010 / 2011 are set out in Appendix B

6.6 Carbon Management

Cutting carbon emissions is a key priority for RCT and the Council will be a participant in the forthcoming Carbon Reduction Commitment Energy Efficiency Scheme.

The Council is committed to managing and maintaining its assets according to best environmental energy efficiency practices compatible with effective service areas. The Council is seeking more efficient use of energy within its property portfolio and a consequent reduction in greenhouse gas emissions.

Key actions for 2010 / 2011 are set out in Appendix B

6.7 ICT Moves & Changes

The ICT service work with the nominated Estates Co-ordinator in relation to office moves and changes to protect the integrity of the Council's ICT infrastructure and ensure on-going service continuity. Lead times to install or move components of the Council's infrastructure can be significant, particularly when third parties are involved, so it is important that as much notice as possible is given to ICT to undertake a feasibility survey.

Where buildings are to be vacated or decommissioned, ICT infrastructure costs and efficiency opportunities for components such as Broadband and Telephony also need to be considered as part of the overall Business Case.

Any costs associated with moves or changes must be met by the relevant Service (this may need to include out of hours work if planned downtime within working hours cannot be agreed).
ICT's Moves & Changes procedure can be found on the Council's Intranet site for further information.

6.8 Sustainability in New Build Schemes

The Council is committed to sustainability and will incorporate the principles at all levels wherever possible.

The design of new builds will utilise WRAP (Cymru) 'Waste Strategy 2009-2050. Towards Zero Waste and the Sustainable Development Scheme One Wales: One Planet.

To ensure compliance with the Welsh Assembly Government's policy on the sustainability of new build. All design briefs will be assessed as part of WAG Planning Guidance Technical Advisory Note (Tan 22), which identifies hierarchical approach to energy efficency leading to low carbon outcomes.

These Drivers include but are not limited to the following:

- Building Research Establishment Environmental Assessment Method (BREEAM) assessment targets (Excellent)
- Climate Charge Levy
- Chartered Institution of Building Services Engineers (CIBSE) TM22
- EU Energy Performance of Building Directive (EPBD)
- Building Regulations Part L (to be implimented Oct 2010) – 2006 revision
- Office of Government Commerce (OGC) Targets – Whole Life Costs for Public projects
- Planning Policy Wales – Technical Advisory Note (Tan 12) Design
- The Sustainable Development Action Plan
- Climate Change Strategy
- Carbon Reduction Committment

The Council is striving towards delivering low carbon buildings and an excellent 'BREEAM' rating will be attained in all its future school provision.

Key actions for 2010 / 2011 are set out in Appendix B

6.9 Fire Risk Assessment - Regulatory Reform (Fire) Order 2006

The legally responsible person for each building is identified and is required to manage the process of identification of hazards and risks to building users/staff in relation to the building. They are required to ensure that there is a formal written assessment and procedure in place. This assessment could identify recommendations required to be addressed.

The Council is working towards a 'Corporate' lead standardised approach to FRA's across the Council. A report is currently being finalised that will outline recommendations for formal implementation during 2010/11.

Key actions for 2010 / 2011 are set out in Appendix B.

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6.10 Statutory Maintenance

Electrical and mechanical engineering equipment items are required, in law, to be serviced / maintained on a cyclical basis e.g. Fire Alarm / Emergency Lighting, Lifts, Gas appliances etc.

During 2010/11 the Council has agreed to deliver a major initiative by providing the lead role for a joint working initiative with the Welsh Purchasing Consortium Construction Group.

Sixteen local authorities in South, Mid and West Wales have agreed to join the new Welsh Purchasing Consortium (WPC), which will deliver clear benefits from collaborative engagement.

The WPC will look to deliver efficiencies through procurement, working with its stakeholders across local government, and applying procurement practice around levers and tools such as:

- Economies of Scale
- Harmonisation of procedures and information
- Alignment of priorities and operational activity
- Improving sustainability and supply chain management
- Added value through Community benefits
- Management of risk, and improved accountability

The procurement of Electrical and Mechanical Engineering Services related Contracts, will ensure that contracts provide compliance with current E.U. procurement regulations.

Key actions for 2010 / 2011 are set out in Appendix B

6.11 Improving Access to Services

The Council has an obligation to ensure its services are available to all potential recipients and that it does not discriminate in Service provision due to the premises from which services are delivered. To ascertain the position, officers have undertaken audits of Council buildings in order to assess where there may be limitations / restrictions on use by disabled persons. The audit provides the basis for planning improvement measures where appropriate.

Achievements to date include:

- Identification of 'key' sites to provide disabled access – 190 sites
- Establishment of a central fund to 'kick off' the access initiative
- Establishment of performance indicator to monitor progress of providing improved accessibility

- Accessibility level against KPI of 90%
- Access audits of in excess of 190 sites
- Disability forum, open to the public, to raise awareness and guidance.

Key actions for 2010 / 2011 are set out in Appendix B

6.12 Centralisation of Office Accommodation Budgets

Centralisation of property management budgets has the potential to make efficiency savings and ensure property maintenance budgets are targeted to the areas of need.

Corporate Estates currently manages 'central' budgets for statutory contract maintenance, asbestos and legionella management and DDA compliance. It is proposed that further property management budgets are centralised and that Corporate Estates takes on responsibility for on-going budget management/monitoring.

An initial examination of property management budgets revealed there are a number of common revenue budget heads that will lend themselves to centralisation such as; rent, rates, service charges, insurance, maintenance, energy and security.

Capital budgets for the refurbishment/improvements of the portfolio also lend themselves to centralisation, as this is where asset management can really influence the allocation of budgets ensuring they are targeted to the areas of need.

It is proposed that a phased approach be undertaken for the centralisation of budgets, concentrating firstly on the budgets held for the 44 operational office sites.

The Workplan for this project is set out at Appendix B.

6.13 Community Asset Transfer

A fundamental aim of the Council is to support community development and empowerment of communities to help them deliver their own solutions to local needs and demands.

The Welsh Assembly Government has launched The Community Asset Programme which is a jointly funded £13 million programme (capital and revenue) administered by the Big Lottery Fund. The development of the programme has been strongly influenced by the "Quirk" review of community ownership and management of public assets, which demonstrates the real opportunity for community empowerment offered by asset transfer.

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Application for Community Asset Transfers are considered by Corporate Estates from community organisations whose aim is to tackle issues of economic, social and environmental sustainability in an integrated way by generating income streams and providing quality services and amenities. To ensure a consistent and robust approach to assessing such applications, it is intended to utilise the policy set out at Appendix D. This method will apply to any requests to transfer/lease Council owned premises to not for profit organisations.

The applying organisations are invited to submit detailed business plans comprising capital and revenue costing, details of funding and other sources of income, details of proposed community benefit and support, sustainability and a timescale.

Following verification of the information provided a decision in respect of the asset transfer and whether it will be at a market value or at undervalue is confirmed. (See Appendix D)

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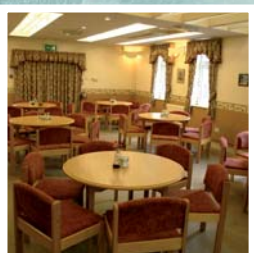
7. Future Issues

The Council recognises that the issues mentioned in the following section will have a direct impact on the future management of its land and buildings.

7.1 One Wales Document

Published in 2009, the One Wales Document outlined long term sustainability objectives for Wales. This document lists key actions and objectives that each local authority in Wales must achieve. Examples include the objective for Wales to become a Zero Waste Nation by 2025 – part of which includes Municipal Authorities reducing their waste by 70% by 2025.

Other all Wales objectives include: improving our economic output as measured by Gross Value Added (GVA) per head of population; reduction in the number of Low – Income households through specifically reducing the communities that are classified as Lower Super Output Areas (LSOA); building on the RCT Local Biodiversity Impact Plan and considering the use of the Ecological Footprint as a tool of measuring the LA's improvement process.

7.2 Partnership Working

Rhondda Cynon Taf has a history of successful partnership working and there has been a considerable commitment to this approach from all sectors of the community. The Partnership Congress has begun to realise the benefits of partnership working, particularly in delivering more seamless services and providing greater choice for service users.

In March 2008, Rhondda Cynon Taf's Local Service Board was established, with its key purpose to "add the edge of accountability to the existing partnership framework in Rhondda Cynon Taf".

The Community Strategy 2010 – 20 sets out the vision for Rhondda Cynon Taf, describing some of the things partners will do to make Rhondda Cynon Taf one of the best places to live, work and visit in South Wales. No single organisation could hope to make such wide reaching improvements on its own. These aims will be achieved only if all the organisations and communities have a commitment to the County Borough's future.

7.3 Climate Change

The Local Authority has been involved in the groundbreaking "Changing Climate Changing Places" programme. This is sponsored by the WLGA, the Met Office, Oxford University and Wales Assembly Government. The aim of this programme, of which RCT is a pilot authority, is to ensure we can deliver our services and maintain our assets, irrespective of what climate change may bring to our communities.

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The Corporate Sustainable Development Forum has identified Climate Change adaptation as a key priority and this has been reflected in discussions with the Local Service Board. The emerging priority given to Climate Change reflects the advice and guidelines issued by WAG (Climate Change Strategy for Wales – Programme for Action) and the UK Department of Energy and Climate Change (DECC) (Climate Change Act) which in turn is reflected in the Wales Audit Office approach to Sustainability within Local Government.

7.4 Ecological Footprinting

Ecological footprinting is currently a growing method of assessment of a Local Authority's contribution to its economic, environmental and social outcomes. In terms of our AMP, this will impact the method in which we are assessed in terms of our facilities management while utilising the limited economic and environmental resources available.

8. Property Reviews

8.1 Underused Property

The Council's Asset Management and Property Reviews are designed to identify under-used properties that do not comply with the present or future needs, either Corporately or of any Service.

The Council will continue to review surplus assets identified with a view to disposal and realising a capital receipt where possible unless a strong business, social or environmental case can be made for retention or a possible transfer to another body under the Community Asset Programme.

The programme for review over the plan period is set out at Appendix B.

8.2 Community Asset Review

The Community Asset Review provides a framework and acts as a catalyst to improve value for money obtained through the project which has as its goals the formulation of:
"A strategic partnership across Rhondda Cynon Taf with all potential stakeholders, that aspires to improve and rationalise community asset management through more cost effective practices, thereby supporting the delivery of better public services".

A consistent and reliable approach will be achieved by following the policy procedure set out in appendix D.

It is proposed in 2010 to review benefits gained following rationalisation and disposal of community assets. The work plan for this project is set out at Appendix B.

8.3 Office Accommodation Review

The Council has been engaged in implementing a series of improvements in the use of its office accommodations since 2008.

Over previous phases it has been possible to:

- Reduce the number of office buildings owned by 4 (a reduction of 2276 m2).
- Reduce the proportion of leasehold premises in the portfolio
- Introduce a standard space allocation of 7.5 m2 per person and apply this standard to all new occupations.

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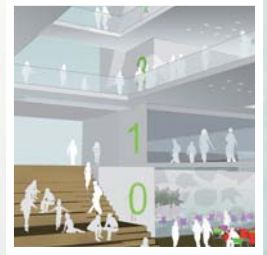
At the start of this plan period the office portfolio comprised the following:

Table 5 – Office Accommodation Portfolio

	No. of Sites	Floor Area (GIA)	% floor area
Council Owned - Freehold	26	29,941	61%
Council Leased-In	19	18,840	39%
Totals	45	48,781	100%

There is scope to further improve the performance of this category of property and in particular to make further progress with the issues noted above.

It is intended to present a formal report outlining proposals for the next phase of the accommodation strategy in 2010/2011.

A detailed workplan is set out at Appendix B.

8.4 Future Reviews

Education: The Council is engaged in a comprehensive review of its schools throughout the County, under the 21st Century Schools initiative. This is being undertaken to ensure that schools are fit for the 21st Century. The project is expected to last 10 years and should ensure this portfolio is sustainable in the long term.

Social Services: During the overall period of this plan it is intended to review older premises occupied by Community and Children's Services. This will be undertaken to improve service delivery and increase efficiency in the use of property assets.

ICT are currently assessing the implementation of Multi Functional Printers to be deployed across key sites and are also both supporting Mobility projects and devising a draft policy around Mobile / Alternative Site working via their Mobile & Flexible Working Group (which has Corporate Estates representation).

Details of initial actions are set out at Appendix B.

9. Developing The Portfolio

9.1 Property Assets and Corporate Priorities

The Council is not a property company and therefore does not 'trade' in property as a core activity. The property assets it owns are of use only insofar as they support service delivery programmes and strategic policy priorities. It is essential that the rationale for holding each property asset is understood and challenged.

The nature, extent and composition of the property portfolio should change in response to development of new Corporate Priorities. This is not a straightforward process, however, as property assets are not necessarily easy to trade and adapt. Nevertheless, within existing management arrangements, provision has been established to ensure that changes in Corporate Priorities, which have implications for property assets, are identified. The process is summarised below.

Each Service Group's individual business plan sets out the services' key programmes to support the Council's objectives as set out in the Community Plan, "A Better Life".

Any property implications arising from the business plans will be included in the Service Asset Management Plan.

It is intended to include Action Plan assessment forms in the SAMPs, which focus on the service areas key objectives and the subsequent actions. The assessment requires resource implications for accommodation etc., and will be used to evaluate future property needs.

9.2 Property Issues Identified in SAMPs

Initial SAMPS have been produced for each of the Corporate service areas. Key property issues arising from this plan are summarised below (see Workplan at Appendix B).

A. Environmental Services (December 2009)

- There is a need for investment in parks and play equipment.
  ACTION: Prepare business case for future investment.
- There are significant assets committed to storage of records and consumable products. Over the long term there is scope for rationalisation, including the introduction of electronic records.
  ACTION: Review storage options when resources are available.
- Improve the physical condition and state of repair of certain premises.
  ACTION: Seek to identify funding for investment.
- Depots to be reviewed to determine whether usage and utilisation can be improved.
  ACTION: Undertake review.

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- Sardis House lift needs to be renewed.
  ACTION: Availability of funding to be investigated.
- Undertake condition survey of all assets occupied by Environmental Services.
  ACTION: Determine programme of condition surveys, when resources available.
- Public Conveniences to be subject to a strategic review based on current need.
  ACTION: Undertake a review and determine programme of priority action.
- The existing programme of renewal of bus shelters will continue as funds permit.
  ACTION: Continue the programme of bus shelter renewals.
- Parcels of land occupied by the service may be surplus to requirements and available for reallocation or disposal.
  ACTION: Complete a review of 'land' assets allocated to Environmental Services.

B. Corporate Services

There are no current actions identified in respect of Legal and Democratic Services and the Corporate Procurement Unit.

- Ty Elai Contact Centre expansion. Progress 47 seat expansion and deliver on WAG capital grant targets (Area complete April / May 2011) for Communications Hub and associated occupation.
  ACTION: Complete expanded area by April 2011.
- Undertake a review of the Business Case for Centres 5 and 6 – One4all contact centre.
  ACTION: Prepare and review business case for centre growth.
- Explore opportunities for closer alignment of services and access points.
  ACTION: Review with Service Directors for :
    - Registrar Services
    - Library Services
- Request improved security at Rock Ground One4all Centre.
  ACTION: Request Corporate site priorities and funding include recent security review findings.
- Llantrisant Model House and Nantgarw China Works Museum would both be better managed through an external body.
  ACTION: Management of these assets currently resides with Corporate Estates; however the position is to be reviewed at the end of the current financial year.
- A portfolio of SAMPs is required for all Services Groups.
  ACTION: In order that a Corporate Services SAMP can be compiled an officer working group is to be set up. With each of the services that comprise Corporate Services represented, each will take responsibility to submit a Service AMP to Corporate Estates in an agreed format. The group will meet four times through the year to discuss the SAMPs progress and address any issues.

C. Community and Children's Services

- To allow more focussed service provision at Llwynypia, the ACM team and Health Specialists could be relocated to another location within Rhondda.
  ACTION: Look at alternative location in Rhondda

- Ideally would wish to invest in respite facilities in the Rhondda.
  ACTION: Continue to explore funding options.

- Review Day Services to people with mental health issues.
  ACTION: Complete the review.

- Strategy needs to be determined for premises vacated following staff moves to new Mountain Ash Hospital.
  ACTION: Consider as part of the Corporate Office Accommodation Review.

- Seek to relocate RCT Independent Living Staff with Trust Outreach Staff to provide comprehensive service.
  ACTION: Keep the matter under review, should an opportunity arise.

- Seek central location for Intermediate Services and single point of access.
  ACTION: Keep the matter under review.

- May need additional equipment storage facilities for Vision Products and for chair lifts and tracked hoists.
  ACTION: Prepare a Business Case for each.

- There are issues in respect of various offices including the condition of certain premises and surplus capacity.
  ACTION: Consider as part of the Corporate Office Accommodation Review.

- Review children's accommodation to address issues of building quality and potential service area growth.
  ACTION: Keep under review.

- Implications of extending 'On track' model across RCT and issues of school holidays if continue to utilise school premises.
  ACTION: Seek clarification of implications

- Cynon Valley accommodation proposal's for Exchange Buildings as children's accommodation base as opposed to Ty Caradog.
  ACTION: Seek funding

- Review children's reception areas and disability access.
  ACTION: Discuss with colleagues in Corporate Estates

- Storage continues to be a problem.
  ACTION: Review current usage and alternative solutions

- Review of Contact Centre facilities is required.
  ACTION: Links with developments around Exchange buildings

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D. Education and Lifelong Learning – (November 2009)

- Produce reliable information on the physical condition of all schools.
  ACTION: undertake a rolling programme of condition surveys for all schools over a 5-year period.

- Major capital projects on going at present time:
  ACTION: Projects under construction include the new Williamstown Community Primary School, the refurbishment and remodelling of Maerdy Junior School, to accommodate the amalgamated Maerdy Primary, an extension at YGG Castellau to provide additional pupil capacity and a new Foundation Phase block and other refurbishments at Penywaun Primary School which will also allow for the demolition of the existing Nursery and Infant blocks, which are in poor condition.

- Previews/closures of schools.
  ACTION: An extensive School Modernisation and Transformation Programme is underway in RCT, with the ultimate aim of providing school buildings that are in a good condition, and ensuring that we provide the right number of school places, in the right place. This review programme has been on-going for the last 10 years and will continue throughout the plan period.

- Bids for SBIG and other funding sources.
  ACTION: Detailed bids for funding are always submitted whenever the opportunity presents. Recent bid has been successful with an £8 million bid to construct a new Area Community Primary School for Abercynon, which will enable the closure of three existing schools which are in a poor condition, the removal of excess surplus places and in addition, will also provide new community education facilities and a new public library for the village. Two previously unsuccessful bids will be resubmitted at this time as part of the first applications for funding under the new 21st Century Schools initiative.

Libraries
ACTION: Continue to monitor condition of building stock and provide modern premises where they are needed, and to investigate all opportunities to obtain grant funding for such work, e.g. CYMAL, to improve and modernise facilities for the public.

Continuing Education
ACTION: As with schools and libraries, continue to monitor condition of building stock, and rationalise and improve buildings wherever circumstances permit. Continue to extend and improve the delivery of the E3+ provision at secondary schools.

9.3 Medium Term Financial Plan

The present stage of the economic cycle and current national financial strategies are likely to cause severe financial pressure on public sector finances for the short to medium term at least. It is likely that National Government/WAG policy will tend to increase this pressure.

The costs associated with owning and operating premises represents one of the largest costs to be met from the Council's budget. It is inevitable, therefore, that savings will need to be identified from these budgets. Such savings over the plan period will include such measures as:

- More intensive use of premises
- Disposing of surplus premises
- Reducing the proportion of leasehold premises
- Improving energy efficiency and water consumption
- Actively managing premises let to others
- Seek opportunities for joint use of premises.

The annual AMP work plan and the Council Medium Term Financial Plan will be cross-referenced regularly to ensure consistency of approach.

Rhondda Cynon Taf County Borough Council
Corporate Asset Management Plan
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Appendix A

Terms of Reference and Composition of the Corporate Asset Management Working Group

Terms of Reference

- To represent Service Groups/Divisions as key stakeholders.
- Attend quarterly meetings or as and when requested by the Asset Management Team.
- Consider property related matters including: statutory requirements, service delivery, reports, operational issues and strategic asset management.
- Disseminate information as necessary to all relevant persons within your Division/Service Group.
- Obtain necessary resources to fulfil functions/actions arising out of the Corporate Asset Management Working Group meetings.
- To agree and indentify risks associated with assets and to agree/implement risk management strategies (e.g. Accessibility , energy, asbestos and Legionella etc).
- Provide information/feedback to individual Division/Service Group Asset Management Group representatives in readiness for the annual AMG meeting.
- Co-ordinate/update and provide annual Service Asset Management Plans in accordance with an agreed framework.
- Ensure SAMPs are sufficiently detailed to inform the relevant capital and revenue programmes.
- Consider the draft Corporate Asset Management Plan for the whole Council, providing feedback as necessary prior to the plan being published.

Composition of Asset Management Working Group

- Head of Corporate Asset Management (Chair)
- Corporate Estates Surveyor (Operational Property Management)
- Service Operational Managers with responsibility for property:
  - Head of Leisure, Parks and Countryside
  - Corporate Maintenance Manager
  - Service Level Manager
  - Service Director
  - Principle Recreation manager
  - School Organisation Officer
  - Environmental Support Unit Manager
  - ICT Communication Analyst
  - Head of I.C.T.
  - Head of Support Services
  - Car Parks Service Manager
  - Education Maintenance Manager
  - Principal One4all Centre Manager
  - Business Support Manager
  - Customer Services Manager
- Corporate Finance Officer
- Operational Highways Manager
- Other operational/senior officers as required

Meetings to be held quarterly, with interim monthly meetings as required fulfilling its operational functions. Reports to the Strategic Asset Management Group presented by the Head of Corporate Asset Management.

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Appendix B

AMP Workplan for 2010/11

The Council's Priorities for Improvement are listed below. Each has been given a reference number in order to illustrate the links between actions in the AMP workplan and corporate improvement objectives.

Priorities For Improvement:

1. Top quality education for all
2. Cleaner and Greener streets and open spaces
3. Safer and more stable home lives for vulnerable children
4. More support for adults and older people to live independently
5. More town centre and community regeneration
6. Working with partners to deliver more visible improvements
7. More effective enforcement action to tackle anti-social behaviour
8. More accessible services, increasing the ways you can contact us
9. Make better use of our Money
10. Improving our communications with you
11. Developing our staff and making better use of our buildings
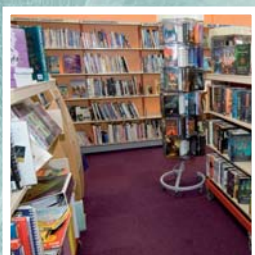
AMP Workplan for 2010/11

Action / Task	Link to Priorities for Improvement	Lead Officer	Target Date
1. Introduction			
Review AMP with Corporate Asset Management Group	11	Head of Corporate Asset Management & Support Services	August 2010
Present AMP to Cabinet for Comment / Approval	11	Director of Corporate Estates and Head of Corporate Asset Management and Support Services	September 2010
Continue to promote Asset Management Planning through the CAMWG to maintain awareness of Asset Management Planning and the need for co-ordinated planning.	9,11	Head of Corporate Asset Management & Support Services	31st March 2011
2. Service Asset Management Plans			
Undertake annual consultations with stakeholders and Service Departments via CAMWG and meetings with respective DMT's	10	Head of Corporate Asset Management & Support Services	31st December 2010
3. Stakeholder Views			
Service Groups to extend the collection of stakeholder's views for future SAMPS	10	Service Groups	31st December 2010
4. Performance And Condition Of The Exisiting Portfolio			
4.2 Non Operational Property			
Undertake financial analysis of performance of "investment" property over plan period. 1st phase in current year	9, 11	Corporate Estates Surveyor(General)	March 2011
Ensure maximum occupancy is achieved and income generated for each property	9, 11	Corporate Estates Surveyor (General)	Continuous

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Action / Task	Link to Priorities for Improvement	Lead Officer	Target Date
4. Performance And Condition Of The Exisiting Portfolio			
4.2 Non Operational Property			
Continue close working relationship with WAG on management issues concerning Porth Plaza and maximise any potential income from them	6, 9, 11	Corporate Estates Surveyor (General)	Continuous
4.3 Heritage			
Monitoring of Listed Buildings and Conservation Sites	9, 11	Museums and Heritage Team supported by Corporate Maintenance Manager	Continuous
4.4 Surplus premises Land Review			
Review next tranches of assets and minimise surplus sites retained by the Council	9 , 11	Land Review Project Manager	31st March 2010
Produce a prioritised list of land identified for sale	9	Land Review Project Manager	31st March 2010
Manage retained surplus sites prior to disposal and minimise costs	9	Land Review Project Manager	Continuous
Disposal			
Monitor market conditions regularly and prepare assets for disposal	9, 11	Corporate Estates Surveyor (Disposal)	Continuous
Prepare sites for Auction	9, 11	Corporate Estates Surveyor (Disposal)	September 2010 December 2010
Monitor capital receipts and liaise with Finance regarding agreed targets	9, 1	Corporate Estates Surveyor (Disposal)	January 2011

Action / Task	Link to Priorities for Improvement	Lead Officer	Target Date
4. Performance And Condition Of The Exisiting Portfolio (cont'd)			
4.5 PI'S			
Produce internal PI's - 1st quarter return	9, 11	Performance and Monitoring Officer	July 2010
Produce CLAW PI Returns	6, 9,11	Performance and Monitoring Officer	June 2010
Produce National Returns to LGDU	6, 9 ,11	Performance and Monitoring Officer	31st March 2011
4.6 Analysis of Condition of the Property Portfolio			
Undertake condition surveys for Education portfolio. First phase undertaken in 2010/11	9, 11	Corporate Maintenance Manager	31st March 2011
5.3 Maintaining the Data			
Continue management and entry of historic core data into asset management system (600 sites p.a.)	9,11	Property Information and Assert Officer	Programme to next phase March 2011
Allocation of retained housing land to appropriate Service Group	2,5,11	Property Information and Asset Officer	March 2011
Collection of live core data of the built assets	1,9, 11	Corporate Estates Surveyor (Operational Property)	Continuous
5.4 Land Registration			
Continue registration of land in compliance with Voluntary Registration of Title (448 sites p.a.)	6, 9,11	Property Information and Asset Officer	Programme to next phase March 2011
5.5 Asset Management Software			
Roll out Web based system to other users in the Council	6,8,9,11	Asset Planning Officer	31st January 2011

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Action / Task	Link to Priorities for Improvement	Lead Officer	Target Date
6. Property Management			
6.1 Corporate Tenancy Agreement			
Implement 2nd phase – Development of CTA's for Schools and Education properties and delivery to 18 Secondary Schools	1, 11	Corporate Estates Surveyor (Operational Property)	31st October 2010
6.2 Asset Revaluation			
On-going management of project with Quarterly meetings, payment of invoices and due diligence checks	6,9	Senior Estates Officer	30th June 2010
Revaluation of one third of portfolio in current financial year	6,9	Senior Estates Officer	March 2011
6.3 Condition Surveys			
Phase 1 completion of 30 Condition surveys for the Education portfolio	1,9,10	Education Maintenance Managers	31st March 2011
Phase 2 Completion of 30 Condition surveys for the Education portfolio	1,9,10	Education Maintenance Managers	31st March 2012
Phase 3 Completion of 30 Condition surveys for the Education portfolio	1,9,10	Education Maintenance Managers	31st March 2013
Phase 4 Completion of 30 Condition surveys for the Education portfolio	1,9,10	Education Maintenance Managers	31st March 2014
Phase 5 Completion of 30 Condition surveys for the Education portfolio	1,9,10	Education Maintenance Managers	31st March 2015
WPC Construction Group – Asbestos Joint Procurement of risk Assessment Remedial Works	6,9	Corporate Maintenance Managers	31st September 2010

Rhondda Cynon Taf County Borough Council
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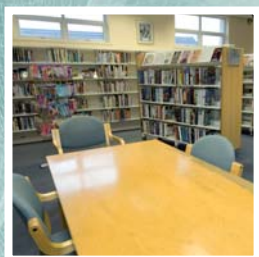
Action / Task	Link to Priorities for Improvement	Lead Officer	Target Date
6.4 Management of Legionella and Asbestos			
WPC Construction Group – Legionella Risk Assessment / Service and Monitoring Contract. Joint Procurement	6,9	Corporate Maintenance Manager	31st March 2011
Procurement of Legionella/Water Hygiene Contract	6, 9, 11	Corporate Maintenance Manager	31st December 2011
6.5 Energy and Water Management			
Delivery of Council's 'Invest to Save' Initiative's (Reduction of Energy Usage)	2,9,11	Corporate Energy Project Manager	31st March 2011
Delivery of SALIX Energy Efficiency Invest to Save Projects	2,9,11	Corporate Energy Project Manager	31st December 2010
Installation of AMR to Council Buildings	2,9,11	Project Energy Officer	31st December 2010
Production of third phase Energy Surveys	2,9,11	Project Energy Officer	31st March 2011
Undertake feasibility study for water abstraction to parks	2,9	Corporate Project Energy Officer	31st March 2010
Completion of Display Energy Certificates	9 , 11	Corporate Project Energy Officer	31st December 2010
6.6 Carbon Management			
Finalisation of the Energy Meter database to enable the determination of the Council's Footprint Report as required by the Carbon Reduction Commitment Energy Efficiency Scheme (CRC)	9,11	Carbon Management Officer	31st January 2011
Submit the CRC Carbon Allowances Auction Bid for the 2011/2012 year	9,11	CRC Account Representative	31st April 2011

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Action / Task	Link to Priorities for Improvement	Lead Officer	Target Date
6.6 Carbon Management (continued)			
Submit the Introductory Phase Footprint report for 2010/2011 CRC Year	9,11	Carbon Management Officer	1st July 2011
Submit the Introductory Phase Annual Report for 2010/2011 CRC Year	9,11	Carbon Management Officer	1st July 2011
Complete the Qualification Assessment and Registration as a participant in the 2nd Phase of the Carbon Reduction	9,11	Carbon Management Officer	30th September 2011
Submit the 2nd Phase Footprint Report for the 2011/2012 CRC year	9,11	Carbon Management Officer	1st July 2012
Submit the Introductory Phase Annual Report for the 2011/2012 CRC year	9,11	Carbon Management Officer	1st July 2012
6.9 Fire Risk Assessment			
Formal implementation of standardised Fire Risk Assessments' for all Service Groups 2010/11	9,11	Corporate Maintenance Manager	31st March 2011
6.11 Centralisation of Office Accommodation Budgets			
Assemble project team and review options	9 , 11	Head of Corporate Asset Management & Support Services	December 2010
Review existing structure and implement changes necessary for the additional responsibility	9 , 11	Head of Asset Management & Support Services	March 2011
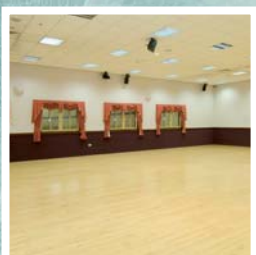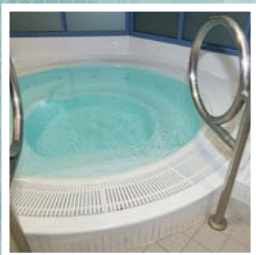
Action / Task	Link to Priorities for Improvement	Lead Officer	Target Date
7. Future Issues			
To review guidelines as and when available from WAG(Climate Change Strategy for Wales – Programme for Action)	6, 9,11	Head of Corporate Design and Maintenance	Continuous
8. Property Reviews			
8.2 Community Asset Review			
Review use of policy for Asset transfer to "not for profit" Organisations	6,9,11	Head of Corporate Asset Management & Support Services	March 2010
8.3 Office accommodation review			
Undertake space Audit of Office accommodation	9, 11	Senior Estates Officer (Operational Property)	30th September 2010
Complete Acquisition of freehold of Ty Trevithick	9, 11	Head of Corporate Asset Management & Support Services	August 2010
Prepare and implement next phase of Office Accommodation Strategy	6, 9, 11	Corporate Estates Surveyor (Operational Property)	March 2011
9. Developing The Portfolio			
9.2 Property Issues Identified in SAMPs			
Environmental Services			
Prepare business case for future investment in parks buildings	6,11	Parks Operations Manager	December 2011
Review options for storing records and equipment at Sardis House when resources are available.	11	Service Director – Highway Transportation and Strategic Projects	Ongoing
Seek to identify funding for investment in buildings and other sites	6	Service Director - Streetcare	Ongoing
Undertake review of depot usage	2,6,9	Head of Streetcare	Ongoing

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Action / Task	Link to Priorities for Improvement	Lead Officer	Target Date
9.2 Property Issues Identified in SAMPs (continued)			
Environmental Services			
Availability of funding to be investigated in conjunction with Corporate Estates for Sardis Lift	11	Service Director – Highway Transportation and Strategic Projects	December 2011
Determine programme of condition surveys of ESG controlled sites in conjunction with Corporate Estates (subject to resources)	11	Service Director - Streetcare	Ongoing
Undertake a review of public conveniences and determine programme of priority action	3,5,6,	Streetcare Enforcement Manager	Ongoing
Continue the programme of bus shelter renewals in line with Heads of Valleys funding.	5,6	Head of Transportation	Ongoing
Complete a review of 'land' assets allocated to Environmental Services	2	Service Director - Streetcare	December 2011
Corporate Services			
Complete Ty Elai Contact Centre expansion area by April 2011	6,8,11	Head of Customer Care	31st May 2011
Prepare and review business case for centre growth	8	Director of Customer Care and ICT ; Head of Customer Care	30thOctober 2010
Review opportunities to align services with Service Directors	8	Director of Customer Care and ICT	31st March 2011
Request Corporate site priorities and funding include recent security review findings	11	Principal One4all Centre Manager	31st March 2011
Review management of Model House and Nantgarw China Works at the end of the current financial year	9, 11	Head of Corporate Asset Management & Support Services	March 2011

Action / Task	Link to Priorities for Improvement	Lead Officer	Target Date
9. Developing The Portfolio			
9.2 Property Issues Identified in SAMPs (continued)			
Corporate Services (continued)			
Compile an office working group set up with each of the services that comprise Corporate Services represented. The group will meet four times through the year to discuss the SAMP's progress and address any issues.	1,9,11	Head of Corporate Asset Management & Support Services	March 2011
Community and Children's Services			
Review current usage of buildings across the Group, surplus & additional requirements	3, 4, 11	Service Director: CB & HS	Ongoing
Seek to identify funding for investment in Exchange building	3, 4, 11	Service Director: CB & HS	December 2010
Determine programme of condition surveys in conjunction with Corporate Estates and prioritise any works in line with available funding	3, 4, 11	Service Directors	Ongoing
Review appearance of reception areas if funding becomes available	3, 4, 11	Service Director: CB & HS	April 2011
Review storage facilities across Group and develop business cases for alternative solutions.	3, 4, 11	Service Director: CB & HS	April 2011
Continue to explore funding options	3, 4, 11	Service Director: CB & HS	31st March 2011
Complete the review of day services to people with mental health issues	3, 4, 11	Service Directors	December 2011
Consider as part of the Corporate Office Accommodation Review	3, 4, 11	Service Directors	31st March 2011

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Action / Task	Link to Priorities for Improvement	Lead Officer	Target Date
9. Developing The Portfolio			
9.2 Property Issues Identified in SAMPs (continued)			
Community and Children's Services (continued)			
Keep relocation of idependent living staff under review, should an opportunity present	3, 4, 11	Service Director	Ongoing
Keep the relocation of intermediate services under review	3, 4, 11	Service Director	Ongoing
Prepare a business case for each additional storage facility	3, 4, 11	Service Director	31st March 2011
Consider condition of premises as part of the Corporate Office Accommodation Review	3,4,11	Service Director	31st March 2011
Keep building quality under review	3,4,11	Service Director	Ongoing
Seek clarification of implications of extending 'on track' model	3,4,11	Service Director	Ongoing
Seek funding for accommodation proposal	3,4,11	Service Director	December 2011
Discuss reception areas and disability access with colleagues in Corporate Estates	3,4,11	Service Director	December 2011
Review current storage usage and alternative solutions	3,4,11	Service Director	March 2011
Review links with developments around Exchange buildings	3,4,11	Service Director	December 2011

Action / Task	Link to Priorities for Improvement	Lead Officer	Target Date
9. Developing The Portfolio			
9.2 Property Issues Identified in SAMPs (continued)			
Education and Lifelong Learning			
Complete 2nd phase of School feasibility studies	1,9,11	Director of Education and Life Long Learning	31st March 2011
Completion of Williamstown Community Primary School	1,9,11	Director of Education and Life Long Learning	31st August 2011
Completion of design stage and on site target for the new Maerdy Community Primary School	1,9,11	Director of Education and Life Long Learning	Easter 2011
Completion of extension on YGG Castellau	1,9,11	Director of Education and Life Long Learning	31st July 2010
Completion of new Foundation Phase block at Penywaun Primary	1,9,11	Director of Education and Life Long Learning	31st July 2011
Delivery of New Changing Rooms Y Pant Comp	1,9,11	Education Maintenance Manager	31st March 2011
Delivery of new classroom extension to park Lane Special School together with internal modifications to therapy areas	1,9,11	Education Maintenance Manager	31st March 2011
Delivery of major refurbishment works to Aberdare Park Primary School	1,9,11	Education Maintenance Manager	31st March 2011

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Appendix C

Summary of RCT's Property Portfolio

Usage	Number of Sites
Depots & Workshops & Storagex	34
Investment Properties	3
Bus Station	3
Allotments	72
Day Centres	34
Theatres Museums & Galleries	6
Advice Centre + One for All Centres	5
Residential Homes	16
Homes for the Elderly	12
Garage Site	55
Sports Centres & Pools	14
Libraries	30
Office Buildings	45
Cemeteries and Crematoriums Sites	14
Public Conveniences	39
Community Centres	52
Secondary Schools	19
Primary Schools	93
Infant Schools	15
Junior Schools	6
Early Years & Nursery Schools	3
Special Educational Needs Schools	4
Pupil Referral Units	3
Land (inc. Surplus Assets, verges, Highways, Play Areas, Car Parks, Parks)	1155

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Appendix D

Policy for consideration of requests to transfer premises owned by RCT to organisations operating on a not for profit basis

1. Purpose of the Policy

To provide a consistent approach for consideration of requests to transfer/lease premises.

2. Application of the Policy

This policy applies to all requests to transfer/lease premises (both land and buildings) from the Council to voluntary and charitable organisations. This includes schemes proposed under the WAG Community Asset Transfer scheme and those funded by the recent big lottery fund allocation.

3. Background

The Council owns a large property portfolio from which it delivers services to the communities it serves. Often this will be undertaken by Council Departments directly, but on occasion the service will be delivered by other organisations acting alone or in partnership with the Council.

There are occasions when a community-based organisation may be best placed to provide a particular service due to the experience of that organisation or access to resources (human or financial). To provide a robust base for long term planning and to access grant funding, community organisations will sometimes request that the Council transfers control of one of its property assets to that organisation.

The Council is keen to work with others to provide effective services through a variety of delivery mechanisms. There are no objections on policy grounds to transferring/leasing property assets. The Council is committed, however, to managing its assets effectively in the long term and, therefore, before proceeding it will need to be fully satisfied that the proposals for the service and the property asset are robust, sustainable and deliverable in the long term.

4. Procedure to be followed if applying for a lease/transfer

To assist applicants, the process to be followed is set out on the flow chart attached to this policy. By way of further classification, the following guidance is provided in respect of the various stages.

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A. Initial Letter of Interest

- Identify the property or parts of a property, including any associated facilities such as car parks, open space or additional land for building. A plan would assist.

- Identify the applicant including its registered address, charity registration number (if one available), size, length of operation, existing activities, links to other prospective partners (if any) and named contacts.

- If there are existing occupiers at the premises, state the relationship of the applicant to same.

- Give a brief description of the proposal including an indicative programme. Indicate what practical or financial support will be requested from the Council (if any). State the specific outcomes and benefits to be delivered by the project.

B. Initial Decision

- The motivation to dispose of property in this manner is that it helps the Council achieve its aims as stated in the Community Plan and assists the Council in its responsibility to deliver core services. The anticipated outcomes from the proposals, therefore, will be considered in the context of key strategic documents, especially the Community Plan, the Corporate Improvement Plan and the Asset Management Plan. This assessment is critical to the process and should be undertaken by the relevant specialists within the Council.

- Property Assets are not "free" and their transfer on a long lease may entail direct or indirect costs. These will need to be quantified by Council Officers and factored into the decision.

C. Approved to Next Stage

- This is not a decision in principle to undertake a transfer/lease and should not be considered such. It merely indicates that the proposal broadly aligns with the Council's policy objectives and there are no reasons not to proceed to consideration in detail.
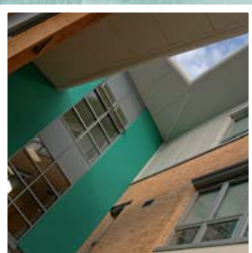
D. Business Plan

It is recognised that production of a reliable Business Plan will entail considerable effort and potential expense. It is, however, critical to the process. An application cannot be considered unless a robust and fully costed Business Plan is provided. This must include the following:

- Details of all capital costs and demonstrate how these will be met, including a contingency for unforeseen costs.
- Outline the professional and managerial resources available to deliver any capital works and undertake the facilities management/maintenance roles.
- Full details of revenue cash flow (minimum 5 years) including all sources of income and costs relating to the ownership and maintenance of the premises and service delivery. If revenue support is required, identify the source and quantum of that support. It is expected that the operation will need to demonstrate it is self-supporting in revenue terms.
- Define governance structures and the roles and responsibilities of the team built to deliver the project. Indicate whether these roles are voluntary or paid.
- Demonstrate experience of and commitment to partnership working. In particular, specify how the property asset would be used to benefit the community.
- Indicate how legislative and regulatory requirements will be met eg. equalities standards, child protection, health and safety, licensing, etc.
- Demonstrate the local need that the project seeks to meet and the basis upon which quantitative analysis and public consultation has been conducted.
- Explicitly state performance measure, service levels, participation rates, etc, upon which the proposals are based.
- Quantitively state the outcomes anticipated, including jobs created, number of learning opportunities, parts of community reached, etc. This should be set in the context of the Community Plan and other local strategies.
- Demonstrate how the project will be sustainable in financial and environmental terms.
- Identify key risks associated with the project and the mitigation measures to be deployed.
- Provide a programme and timescale for the project. This should highlight any proposed building works, funding decisions, set up period and the time when the project would become self-supporting.

E Verification Process

- It is anticipated that all critical assumptions within the business model will be quantitively assessed and based on objective analysis. The applicant may be asked to provide additional information in support of its application.

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F. Consideration Paid

The Council has a general duty under the Local Government Act 1972 to obtain best value for all disposals of its assets. The general expectation, therefore, will be that any disposal of an asset will be at its full open-market value, paid either as an annual rent or a capital sum.

Should an applicant wish to propose a rent/premium at less than market value it should:

- Indicate the sum proposed.
- Explain, in the context of the Business Plan, why it would not be possible to pay the full value.

Any request for a payment at less than value will be considered by the Director of Corporate Estates in consultation with the Deputy Leader.
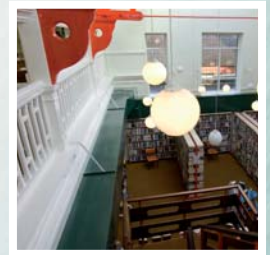
5. General Policy Considerations

The following policy issues will apply in any case within this policy framework.

1. To help delivery of the policy objectives and long-term viability of property assets the Council will retain the freehold of property. Any assets transferred will be on a leasehold basis and the length of the term will depend on the circumstances of the case. Generally a lease of an existing building will be for a term of up to 25 years.
2. Leases will be on "full repairing and insuring" terms, ie all occupation, running, maintenance and management costs will be borne by the lessee.
3. The granting of a lease is required to enable the proposal to proceed, ie it provides a specific benefit such as access to funding.
4. The asset would be fully available for use by a range of local groups. It should be fully compliant with the Disability Discrimination Act.
5. The use of the asset should be sustainable environmentally. This should apply to future refurbishments.

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Flowchart for Considering a Request to Transfer/Lease an Asset

A. Initial letter of interest to include:
• Property details
• roject proposals

B. Initial decision made by Services Director following:
• Consideration in relation to Community Plan
• Property status/value/priority of capital receipt
• Land review/internal and member consultation

→ Not approved

C. Approved to next stage

D. Organisation invited to submit detailed business plan within six weeks and must include:-
• Detailed proposals
• Funding and other sources of income
• Sustainability
• Capital and revenue costs
• Community support and benefits
• Project timescales

E. On receipt of business plan, decision made by Service Director following:-
• Verification of financial information provided in the business plan
• Local Member comments to business plan
• Affected Service Groups comments to business plan
• Confirmation whether proposals are at open market value or at an undervalue?

F. Open Market Value

F. Undervalue

Approved

Not approved

Undervalue Report to Cabinet in accordance with existing procedures

Transfer

Approved

Not approved

Transfer

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Appendix E

Performance Indicators

1. Formally Reported

A suite of performance indicators are formally reported to WAG:
*Note: Condition Surveys have only been undertaken for 11.21% of Building GIA. However, WAG takes these figures as if they represent 100% of our stock.

CAM001ai-aiv

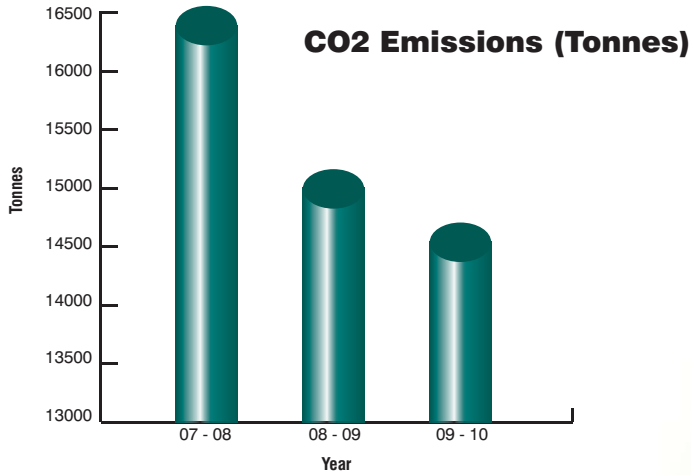| Year	Definition	PI
2009/2010	CAM001ai - Percentage of Building G.I.A. (m2) in Category A	19.18%
2009/2010	CAM001aii - Percentage of Building G.I.A. (m2) in Category B	58.96%
2009/2010	CAM001aiii - Percentage of Building G.I.A. (m2) in Category C	20.23%
2009/2010	CAM001aiv - Percentage of Building G.I.A. (m2) in Category D	1.64%

CAM001 bi-biii

Year	Definition	PI
2009/2010	CAM001bi - Percentage of Building G.I.A. (m2) in Priority 1	0.33%
2009/2010	CAM001bii - Percentage of Building G.I.A. (m2) in Priority 2	15.48%
2009/2010	CAM001biii - Percentage of Building G.I.A. (m2) in Priority 3	51.11%
2009/2010	NOT REPORTED - Percentage of Building G.I.A. (m2) in Priority 4	33.07%

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EEF002a

Year	Definition	PI
2009/2010	Year on Year Carbon Reductions (08/09 to 09/10)	6.2%

CO2 Emissions (Tonnes)

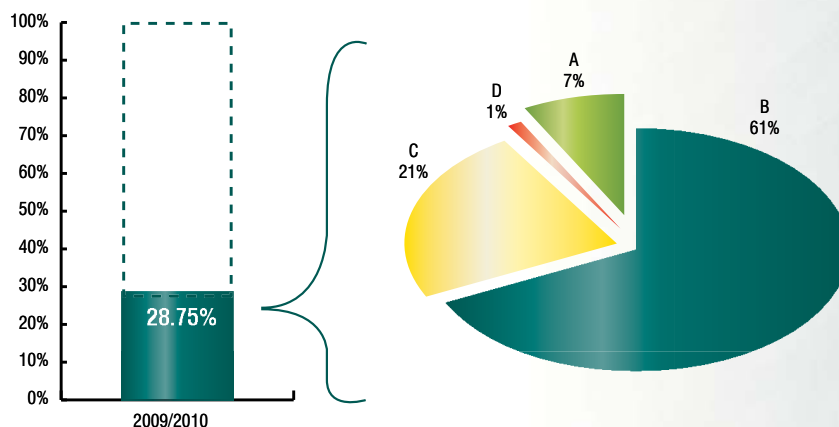(Bar chart: Tonnes (y-axis 13000–16500) vs Year (x-axis 07-08, 08-09, 09-10))

2. Local Indicators – As of 31st July 2010

The Council utilises a number of local indicators in order to drive performance. Through quarterly reports these local indicators assist the Council in identifying overall performance and where potential problems may be present and/or additional resources are required. These property performance indicators, form an integral part of a larger suite with an over arching scope that feeds into the Council Business objectives.

2009/2010	Percentage of G.I.A. (m2) with a completed full Condition Survey (non schools)	28.75%

Condition Surveys are undertaken by suitably qualified personnel and identify the condition of a building. The Condition is rated A – D (A being the best).

Total GIA (m²) covered by a Condition Survey (Categories A-D)

(Bar chart showing 28.75% for 2009/2010, with pie chart breakdown: A 7%, B 61%, C 21%, D 1%)

Rhondda Cynon Taf County Borough Council
Corporate Asset Management Plan
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2009/2010	Percentage of G.I.A. (m2) with a completed 'walkthrough' Condition Survey (schools)	100%

The Welsh Assembly Government provided all 22 Local Authorities in Wales with funding in order to undertake a 'walkthrough' Condition Survey on all School buildings. This will be augmented by a 'full' condition survey for all schools over a 5 year period.

**Total GIA (m^2) covered by a Condition Survey (Categories A-D)**
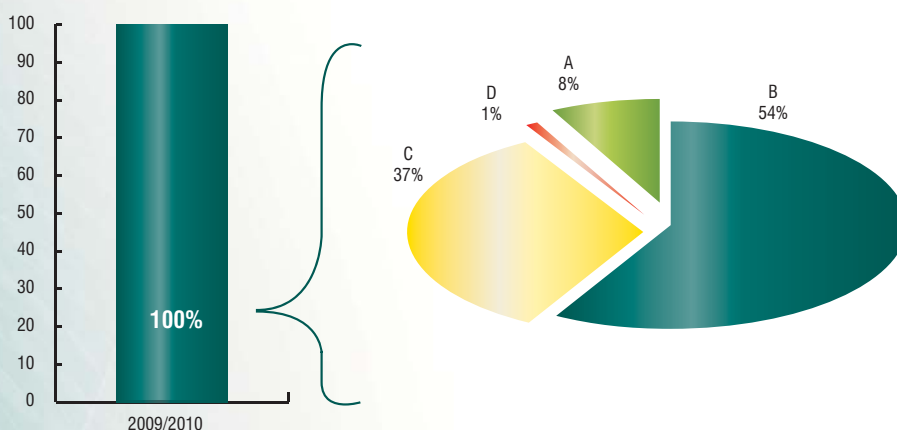
2009/2010	Percentage of sites with a registered Asbestos Risk Rating	99%

99% of Sites (with buildings) on the Asset Register have been assigned an Asbestos Risk rating, which is either determined via a walkthrough survey or full site inspection. The remaining 1 % is currently being undertaken during the current year. There are planned re-inspection, occurring on an annual basis for each site.

2009/2010	% of Public Access Buildings that have had a Access Audit undertaken (non schools)	100%

A total of 190 buildings fall under the DDA. Access Audits have successfully been undertaken in 90% of buildings, with 10% not being required due to buildings being non-compliant due to Listed Status or Build/Site Conditions.
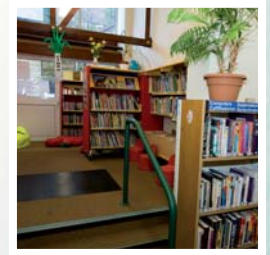
DDA KPIs - Total Buildings Reviewed (non-schools) = 190 (100%)

● Buildings with a DDA survey

● Buildings that were non-compliant due to Listed Status, Bld/Site Conditions

10%

90%
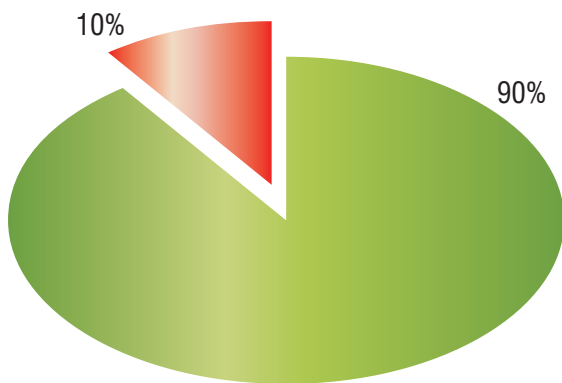
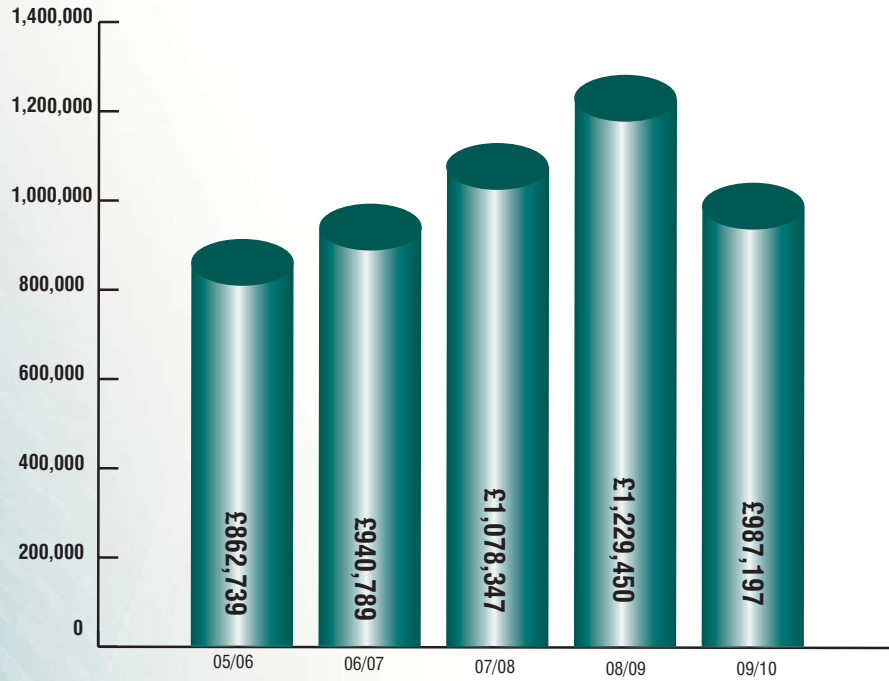| 2009/2010	Number of Sites with a Detailed Energy Survey - (As of 31/03/2010)	67

A Detailed Energy survey provides a concise energy profile of a site. To date, we have carried 67 of these inspections.

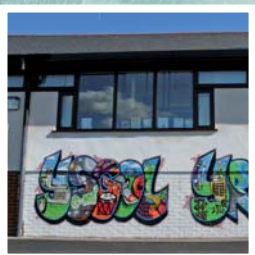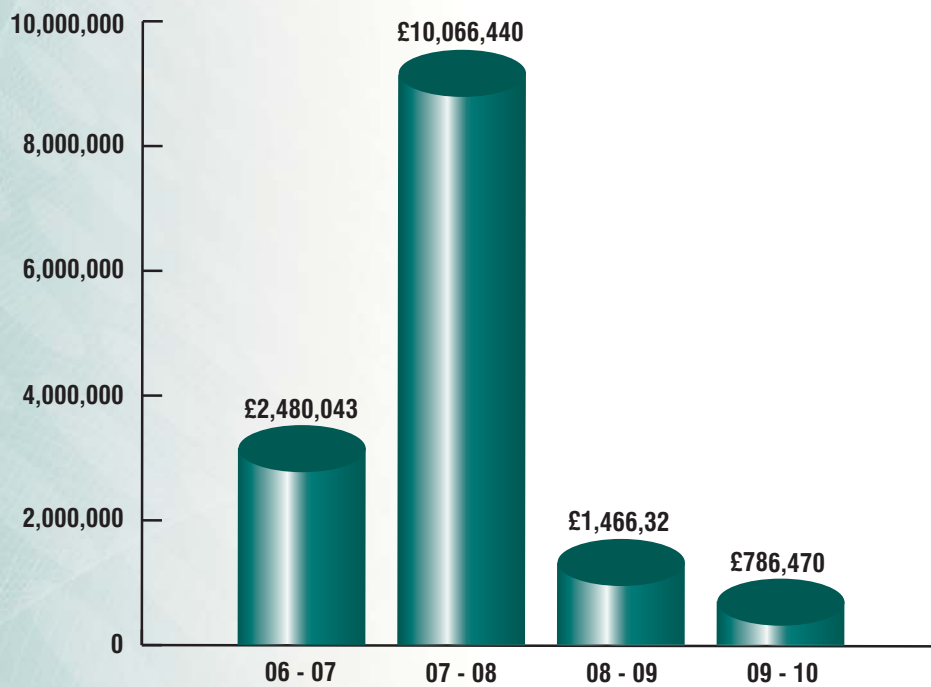| 2009/2010	Number of Sites with a Display Energy Certificate - (As of 31/03/2010)	30

Display Energy Certificates (DEC's) are required for all buildings over 1000 m2 accessible by the public. This category presently holds 176 properties.

Rhondda Cynon Taf County Borough Council

Corporate Asset Management Plan

for Property Assets

2009/2010	Investment Portfolio Rent: Total Revenue	£987,197

Corporate Estates Revenue (£)

05/06	£862,739	
06/07	£940,789	
07/08	£1,078,347	
08/09	£1,229,450	
09/10	£987,197	

2009/2010	Net Capital Receipts from Asset Disposal	£786,470

06 - 07	£2,480,043
07 - 08	£10,066,440
08 - 09	£1,466,32
09 - 10	£786,470

56

2009/2010	Number of Buildings utilised for Office Accommodation	45

Number of Buildings utilised for Office Accommodation

Legend:
- Freehold
- Leasehold
- Total Office Buildings

X-axis: **Financial Year** — 2007/2008, 2008/2009, 2009/2010, 2010/2011

2009/2010	Office Floor space £/m2 (rent)	£73/m2

2009/2010	% of Office Accommodation currently occupied that is Leasehold (GIA)	39%
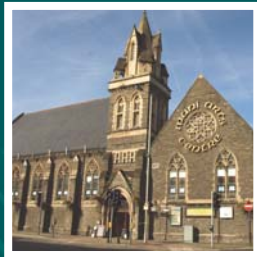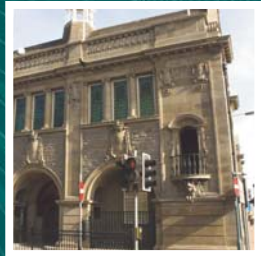
Property Review Report

Core Property Details

UPRN	5296
Site Name	Blaengwawr Comprehensive School
Address	Club Street
	Aberaman
	Aberdare
	Rhondda Cynon Taf
Post Code	CF44 6TN
Committee	Education and Lifelong Learning
Use	School
Listed Status	N/A

Site Plan

5296
Blaengwawr Comprehensive School

Site Details

Tenure	Freehold
Lease Term	N/A
Lease End	N/A
Break Type	N/A
Break Date	N/A
G.I.A.	6,072 m²
T.O.A.	76 m²
Parking Capacity	N/A
Asbestos Risk	M
Condition	B

Site Occupants

Education & Lifelong Learning

Site Level Comments

The school is positioned in a densely populated area with vehicular access off the main road - B4275. The site has numerous split levels and the buildings are mostly single-storey of steel frame construction with concrete infill panels and flat roof construction. The school consists of 6 separate buildings; teaching block 1, teaching block 2, teaching block 3, youth centre, gymnasium & plant room.

User Feedback

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TREFTADAETH CADARN | DYFODOL SICR

Property Review Report

5296 - Blaengwawr Comprehensive School (continued)

Building Status Table

Building	Capacity	Occupancy	% Space Utilisation	Condition	Asbestos Risk	Backlog	Location Critical	Critical Staff
5296/01	0	0	100%	B	M	£437,386	No	0
5296/02	0	0	0%	C	N/A	£52,505	No	0
5296/03	0	0	0%	B	N/A	£54,431	No	0
5296/04	0	0	0%	B	N/A	£83,166	No	0
5296/05	0	0	0%	B	N/A	£26,534	No	0
5296/06	0	0	0%	C	N/A	£250	No	0
5296/07	0	0	0%	B	N/A	£0	No	0
Totals	0	0	100%	B	M	£654,272	No	0

Valuation	£2,437,000.00	Rateable Value	£0

Site Performance Table

Total Backlog	£654,272	Total Backlog /m²	£107.75 /m²
Annual Rent	£0	Annual Rent /m²	£0.00 /m²
Utility Costs	£42,491	Utility Costs /m²	£7.00 /m²

Total Running Costs	£219,195	Running Cost /m²	£36.10 /m²

Recommendations

Signed		Date	

Signed		Date	