

# Introduction to Strategic Asset Management

## Corporate & Resources Scrutiny Committee

6<sup>th</sup> July 2023

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**Somerset**  
Council

# Objectives for today

- 1. Induction for committee members – introducing the department and its work**
  - How Assets are managed at Somerset Council
  - The Strategic Asset Management Department
  - Transition, Change and Transformation
  - Strategic Objectives: delivering the Asset Management Plan
- 2. Committee are asked to consider areas of interest for future meetings**

# How Assets are managed at Somerset Council

## ***Real Estate Assets***

Depots  
Heritage assets  
LA maintained schools  
Offices  
Urban & rural landholdings  
Business parks / enterprise centres  
Libraries & theatres  
Sports and leisure buildings

## ***Infrastructure Assets***

Rights of Way / footways  
Highways  
Street furniture  
Cycle Paths  
Traffic management  
Streetlighting  
Flood / water management assets  
Coastal & Harbour infrastructure

# How Assets are managed at Somerset Council

- Somerset Council has the **economies of scale** to ensure that assets are managed using professional expertise concentrated in appropriate departmental specialist 'centres of excellence'
- The new council will take a '**Corporate Landlord**' approach to the asset management of real estate (land & building) assets – this is recognised best practice.
- Generally, repairs and maintenance and compliance responsibilities for **buildings** is the responsibility of the Strategic Asset Management department. The Strategic Asset Management department also takes a lead role in all real estate transactions.
- Repairs & maintenance and compliance responsibilities for operational '**land only**' or **infrastructure assets** (e.g. parks, open spaces, car parks & highway surfacing) sits within the relevant Climate & Place or Communities Directorate department.
- The asset management of **Housing Revenue Account assets** will sit with the Housing department within Community Services.
- Asset Management arrangements for **LA Maintained School assets** have specific arrangements.
- For **non-property asset classes**, asset management responsibilities will sit with the most appropriate Service Director (generally in the Climate & Place or Communities Directorates).

# How Assets are managed at Somerset Council

Asset class	Examples of assets (not exhaustive)	Responsibility for Real Estate / landlord and tenant transactions	Responsibility for maintenance, compliance and repairs
Operational buildings	Offices, Libraries, Depots	Strategic Asset Management	Strategic Asset Management
Operational land / infrastructure	Car parks, highway, parks, traffic & transport infrastructure	Strategic Asset Management <i>Infrastructure &amp; Transport</i>	Climate & Place / Community Directorates
Housing Revenue Account assets	Housing stock, community centres, shops	Housing department <i>Strategic Asset Management</i>	Housing department
LA maintained schools	Primary, special, secondary, specialist education	Strategic Asset Management	School governing body Strategic Asset Management Education department
Leased / commissioned estate	Leisure Centres, Homes 2 Inspire, leased estate	Strategic Asset Management	Tenant Strategic Asset Management
Commercial Property	Investment property held for yield	Strategic Asset Management	Tenant Strategic Asset Management

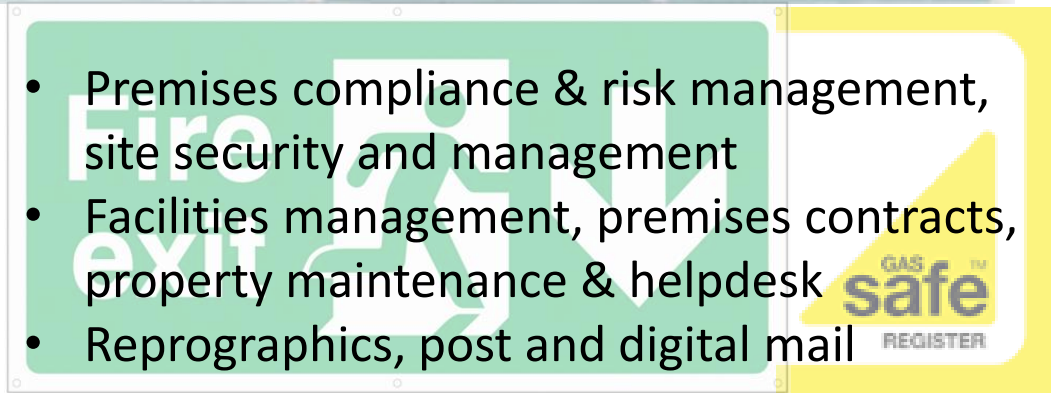
# The Strategic Asset Management Department



- Corporate Landlord function
- Asset management strategy
- Advice & internal consultancy support
- Property rationalisation



- Site acquisition, disposal and development
- Tenancy management
- Valuations
- Rural estate management
- Property records & database



- Premises compliance & risk management, site security and management
- Facilities management, premises contracts, property maintenance & helpdesk
- Reprographics, post and digital mail



- Construction project delivery
- Schools & general fund condition programme
- Estate decarbonisation strategy and delivery

- Closed churchyards
  - Commercial investment property

# The Strategic Asset Management Department

## Objectives

- Support service delivery & Corporate Plan objectives
- Deliver the Asset Management Strategy
- Safe, legal and compliant assets
- Effective management of the commercial investment portfolio
- Effective delivery of major construction projects

# Transition, Transformation and Change

## **Transition projects**

- Asset Management System and Asset Records – Civica Property
- Hard and Soft FM service alignment
- Departmental operating model, structure, policies and procedures
  - Corporate Landlord model
  - Policy framework
- Facilities, print, post and mail alignment
- Commercial investment property review

## **Transformation & Change**

- Property rationalisation
- Estate decarbonisation



# Transition, Transformation and Change

## Civica Property – Somerset Council's Asset Management System

- Property & Estates records
- Condition survey data
- Reactive & Planned maintenance
- Health and Safety Compliance, Fire Risk Assessments
- MS Dynamics interface



# Transition, Transformation and Change

## Property Rationalisation – One Public Estate



Taunton



Williton



Yeovil



Shepton Mallet

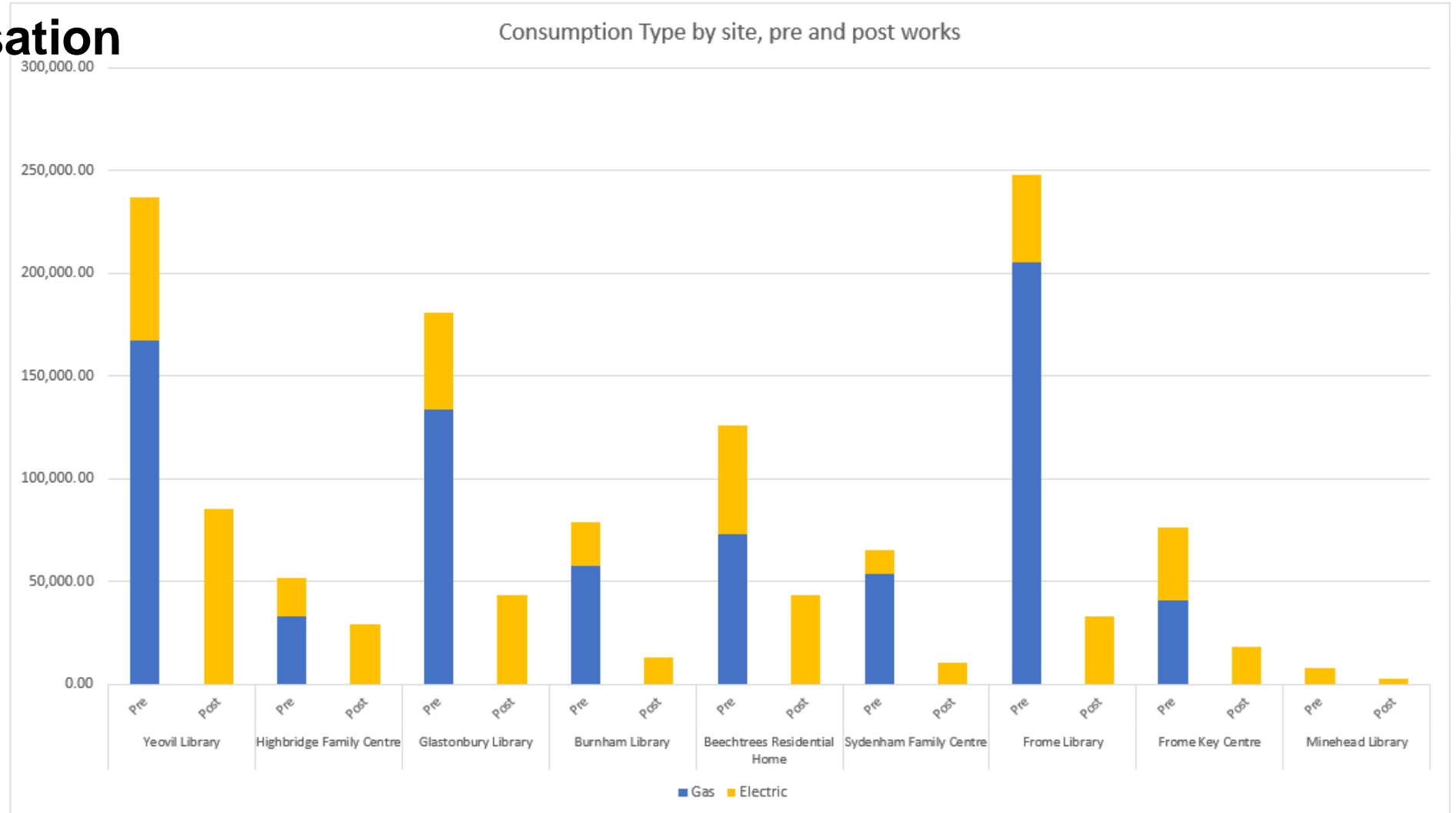


Bridgwater



# Transition, Transformation and Change

## Estate decarbonisation



# Delivering the Asset Management Plan

- The Council's estate is financially sustainable, efficient and effective
- Assets that are fit for purpose, safe & compliant
- Assets that address the Climate Emergency
- The Council's estate is used to meet housing and care needs, with an emphasis on social housing
- The Council's estate supports prosperity and economic growth
- Address the growing challenges in the Council's school buildings estate

# Questions and comments

