

Strategic Asset Plan

2022 - 2027

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Introduction

Local Authorities across the UK hold large property portfolios (assets made up of buildings and land) which have been acquired, gifted or inherited over many years.

Walsall Council is no different, owning or operating over 750 land and building assets, with a total building floor area of over 3,840,000 sq ft covering over 3,200 acres.

It is important for the council to focus on how it uses all of its resources, including, its land and buildings, in order to achieve its goals and deliver the priorities set out in the Corporate Plan. To support this, the council has adopted a new Strategic Asset Plan, prepared taking account of best practice advice from CIPFA, which comprises three separate elements as follows:

- Asset Management Policy
 - Sets out clear principles and objectives which underpin the management of the council property portfolio
- Asset Management Strategy
 - Sets out the main priorities for managing and developing the portfolio in line with the objectives set out in the Asset Management Policy
- Asset Management Action Plan
 - Sets out the main work streams required in order to deliver the Asset Management Strategy with key milestones to measure progress

The Strategic Asset Plan is a suite of living documents, for convenience, divided into three parts - not all parts will need to be updated at the same time for it to remain current. Accordingly, readers are advised to ensure that they have the most up to date versions and the parts are always read together to ensure that the correct context is understood.

The benefit of adopting such a structure is that, many areas relating to our approach to asset management are likely to remain constant for several years (such as our Asset Management Policy). In addition, the strategy is unlikely to change frequently but is likely to have a shorter life than our overall land and property policy objectives. Supporting these two documents is a Working Action Plan, this is a 'living document' and will be used and adapted in order to manage our asset management programmes of work on a regular basis.

Due to the unprecedented challenges faced by the council arising from Covid-19 and the UK's exit from the EU, the council prepared an interim Corporate Plan for the 2021-2022 financial year, pending the preparation of a full three-year Corporate Plan to commence in 2022.

The Strategic Asset Plan is aligned with the Corporate Plan and the council's property and asset requirements for service delivery, revenue and capital have also been significantly impacted by the challenges faced by the council. Accordingly, this document sets out the essential policies, strategies and actions for the council's land

and property portfolio in line with the Corporate Plan and the council's occupational needs under the Reset plan.

ASSET MANAGEMENT POLICY

The Asset Management Policy establishes some clear principles by which the council will manage its land and buildings. It will remain in place for the next five years but be reviewed annually to ensure it is still relevant to what the council is trying to achieve.

1. To take a Corporate approach to all property, land and buildings which involves bringing property together in a centrally managed Corporate Landlord service and maintained as a Corporate resource with Service Directorates and maintained schools occupying corporate property as "tenants" which provides the best mechanism for driving a more strategic approach.
2. To ensure that council services occupy property that is in the right location, fit for purpose, economic to occupy and compliant with statutory and regulatory codes.
3. To optimise the value of the investment portfolio in order to provide valuable revenue income to support council budgets.
4. To act as a professional and effective Corporate Landlord for the council estate, managing it in the best interests of the council and freeing up services to focus on delivery.
5. To align the Corporate Estate with the council's Corporate Plan as well as the council's Climate Emergency Action Plan.
6. To deliver our objectives through strong relationships with the public and third sector partners, exploiting opportunities to deliver joined up services from shared buildings where possible.

Our Objectives

We have set out five policy objectives which describe the council's commitment to property asset management and to achieving the benefits that can be delivered through effective use of the portfolio. These objectives are important for decisions made in respect of our property assets.

In developing these objectives there are certain actions and behaviours that we need to adopt relating to our land and buildings. These are set out under each objective, but not in any particular order of priority. It is also accepted that there will be occasions where some of these elements may appear to be in conflict. The key challenge for the council is ensuring that we maintain an appropriate balance between all of these elements as decisions around land and buildings are made.

1. To plan and manage property as a corporate resource for the benefit of the people of Walsall.

- We have clear corporate decision-making and challenge on all property matters.
- Property budgets are managed corporately to prioritise key investment needs. Property is integrated with other resources.
- We will ensure effective balance between corporate and service priorities.
- We will work to ensure that property information is accurate, current and comprehensive.
- Capital Projects will be managed efficiently and effectively, and prioritised to support the council's Strategic Priorities.
- Forward planning for property will be targeted at the borough's longer term Proud Programme.

2. To provide the right property, fit for purpose, in the right place, to meet current service needs and to plan for the future.

- We will work to ensure that property is suitable and sufficient for service and to provide the optimal environment to enable and support blended working.
- We will work to ensure that property is flexible and is planned to respond to future need.
- We will work to ensure that property is secure, safe to use and fulfilling statutory requirements.
- We will work with our service areas to understand their longer-term requirements, in order to plan for the future.
- We will undertake an ongoing asset challenge process to achieve incremental improvement in the portfolio through investment, disposal and acquisitions.
- We will work with community organisations to optimise the use of assets where most beneficial and to support the delivery of essential services by the community sector.
- We will work to ensure that equalities are considered in the development of our asset plans, fully engaging and consulting with diverse communities that could be assisted by a Community Asset Transfer.

3. To manage and maintain property effectively, efficiently and sustainably, together with optimising financial return and commercial opportunities from the rationalisation and disposal of land and buildings.

- We will ensure property is suitably managed and maintained within budget constraints.
- We will challenge the current use of assets and identify co-location opportunities, to include partners, resulting in rationalisation and disposal of our land and buildings where appropriate.
- We will seek efficiencies in occupancy and utilisation and continue to introduce new ways of working.

- We will challenge the cost of property activities to drive performance improvement.
- We will seek to optimise financial return and commercial opportunities.
- We will ensure that property is as sustainable as possible in design, construction, operation and maintenance.
- We will aim to reduce energy and water consumption, and CO2 emissions, using renewable energy where appropriate.
- We will minimise waste wherever possible.

4. To use land and buildings to stimulate development and growth, together with supporting local business needs and encouraging new business to the area.

- We will use key assets to stimulate and support regeneration and inward investment.
- We will utilise investment for income generation and to create local employment and training opportunities.
- We will manage our commercial portfolio effectively, balancing regeneration needs, job creation and income generation.
- We will promote a high quality physical environment and identity for the borough.
- We will identify a future supply of land, suitable for housing and employment needs.

5. To promote joint working where it will provide benefit for service delivery and in securing efficiencies.

- We will work with other agencies to promote co-location and joint service delivery. We will work to support the integration of health and social care.
- We will support the aspirations of West Midlands Combined Authority.

ASSET MANAGEMENT STRATEGY 2022-2027

This Asset Management Strategy provides an overview of the council's land and property estate, together with our main priorities for managing and developing that estate over the next five years.

The Strategy will be reviewed and amended within three years to ensure our estate fully supports the council's Corporate Plan, by contributing to the key policy objectives for property asset management.

1. To plan and manage property as a corporate resource for the benefit of the people of Walsall
2. To provide the right property, fit for purpose, in the right place, to meet current service needs and to plan for the future
3. To manage and maintain property effectively, efficiently and sustainably, together with optimising financial return and commercial opportunities from the rationalisation and disposal of land and buildings
4. To use land and buildings to stimulate development and growth, together with supporting local business needs and encouraging new business to the area
5. To promote joint working where it will provide benefit for service delivery and in securing efficiencies

Our Land and Buildings

The council's property portfolio extends to over 750 separately listed land and building assets, with a current total book value of over £335 million (as at 31st March 2021). This is the amount that is included within the authority's accounts and, whilst this is not necessarily the exact amount that we would receive if the council sold all of its assets, demonstrates what a considerable resource our land and buildings are, and why they need to be carefully managed.

Without careful management, there is potential to waste money by keeping buildings that are not fit for use or unnecessary. Equally, all assets have a value and if they are no longer required the council might be able to sell them to unlock that value and use or invest the money elsewhere.

As the way the council delivers services changes, its assets will also need to change to support the council as it moves forward. The council may need to invest in new assets to ensure we provide services fit for the future and to maximise benefit to the people of Walsall.

In order to maximise value for money in relation to the maintenance and day-to-day running of buildings, processes are embedded within Corporate Landlord that ensure that capital works are prioritised appropriately, based on evidence from building

condition surveys, and in alignment with operational priorities of those services in occupation. Additionally, the Asset Challenge process ensures that the future of those buildings not providing best value are reviewed appropriately before financial decisions are made on them. The governance structure provides further assurance that money is spent in the right places and on the right buildings.

There is a wide range of assets within the council's current portfolio. It comprises offices, children's centres, day centres, elderly people homes, car parks, public conveniences, leisure facilities, depots, schools, assets leased to community organisations and some used to generate a commercial income. The reasons for holding these assets will vary and, as a result, we may need to measure their performance in different ways. Performance of each asset must therefore be linked to the strategic purpose for holding it.

The table below provides an overview of our property estate by asset type, providing a total number for each type of asset.

| Asset type | Number of Assets |
|------------------------------------|------------------|
| Allotments | 34 |
| Car Parks | 59 |
| Cemeteries | 6 |
| Children's centres / day nurseries | 8 |
| Commercial / Industrial | 14 |
| Community | 54 |
| Culture | 3 |
| Farms / Grazing | 19 |
| Leisure | 5 |
| Libraries | 6 |
| Offices | 20 |
| Other buildings | 6 |
| Other land | 22 |
| Parks / open space | 238 |
| Public conveniences | 2 |
| Residential | 5 |
| Residential Accommodation | 8 |
| Residential ground lease | 21 |
| Retail | 27 |
| Schools / Education | 93 |
| Social Care | 8 |
| Storage | 8 |
| Surplus | 58 |
| Travellers' Site | 1 |
| Waste / recycling | 2 |
| Youth | 13 |

Assets deliver a mixture of front line services, indirect service provision, and in supporting local communities. The council doesn't own assets for the sake of it, they need to have a purpose and the council constantly needs to be challenging this.

Some assets are legacies from donations, local government reorganisation or previous acquisitions.

The council's Asset Challenge process means that we are reviewing each asset on a rolling programme to ensure we only keep the buildings we need in the future. This process explores the utilisation of assets, along with analysis of running and maintenance costs, and geographical location. The outcome of this process will identify asset rationalisation and disposal opportunities to support the council's Medium Term Financial Strategy.

The accommodation needs of council services is a key part of the Asset Management Strategy. The Office Accommodation Policy (Appendix 2) sets out the council's approach to blended working on accordance with the reset plan.

Our Corporate Landlord Approach

We have introduced and adopted a Corporate Landlord approach to the management of the council's land and property assets which is set out in detail in Appendix 1.

The Corporate Landlord approach, through the centralisation of property budgets and the responsibility for management, takes a more strategic approach to the management of the portfolio of assets.

Maintenance and statutory obligations are paramount for a compliant property estate and it is vitally important that we look after our assets effectively. Our overall strategy is to ensure that our finite and reducing maintenance resources are prioritised to appropriate buildings, where the money is needed most and in a way to enhance the life of our building assets.

There is a robust governance structure in place providing direction and transparency of the management of the council's estate as set out below.

- Acting as a forum for process change and development that assist and supports officers to access both internal and external funding in the most effective ways.
- Joining up dots

Directorate level Groups – Building on what exists / what works or the implementation of a new group/s, directorates will review, assess and develop their prioritise project pipelines that can bid for or access Capital funding, together with applications for capital funding as appropriate that fall outside the pipeline etc. This will also support bidding for external funding in support of directorate and indeed corporate priorities. Chairs of these groups will have voting membership of and attend SIB and also the Funding Sub Group, together with their officers as appropriate.

Corporate Landlord Board – Corporate Landlord Board is responsible for ensuring the effective performance of the Corporate Landlord function and the delivery of the aims and objectives of the Strategic Asset Plan. CLB will monitor progress of the Asset management Action plan and agree the annual review of the AMAP. CLB reports directly to SIB on matters relating to the council's property portfolio.

Corporate Asset Review Group – CARG is the forum which brings together the property champions for each directorate and the Corporate Landlord. This group allows cross directorate property related matters to be discussed.

Directorate Asset Review Groups - Each directorate has a Directorate Asset Review Group which is the forum for discussion about the directorate's property requirements for efficient service delivery. All service delivery property requirements and issues should be raised with Corporate Landlord through these groups.

Our Money

Like many other councils, Walsall Council has experienced significant funding reductions and the council needs to make careful choices in where it prioritises the money it spends.

This is especially true in relation to property, with a Corporate Landlord property related net revenue budget of £6.06 million (2021/22), and it is important to ensure that every pound spent is done so in the right way. In addition, there is a Corporate Landlord capital budget of £10.2 million (2021/22) for corporate buildings.

Despite these financial challenges, the council is committed to supporting the borough's economic growth and encouraging job creation and investment through its capital programme. This helps the local economy to grow and thrive so that every pound invested by the authority generates a local economic benefit well in excess of this initial investment.

To ensure that the asset portfolio is compliant with statutory requirements, regular inspection and review of property is completed. The reason for this is that the council has a duty to manage the risk and assess the impact of statutory regulations on its assets in relation to Asbestos, Accessibility, Fixed Wiring and Legionella, as well as Fire Regulation compliance.

The Corporate Asset Management Fund ensures that council property continues to be fit for purpose and meets current and future service needs. It is vital that the council's assets are working hard and contribute to the overall corporate and service objectives.

The management of the Corporate Asset Management Fund is an ongoing activity for rationalisation, statutory maintenance and planned maintenance enhancement projects. Any improvements / enhancements must meet set criteria, aligned to the Chartered Institute of Public Finance and Accountancy (CIPFA) guidance of capitalisation of expenditure, extending the usable life of the asset and increasing the extent to which the asset can be used.

The Corporate Landlord Service is working with service directorates to maximise opportunities for external funding to support improvements to the property portfolio, with a particular focus on energy efficiency and carbon reduction.

An advanced programme of commercial lease renewals and rent reviews is underway to maximise the income to the council from the commercial portfolio. In addition to maximising annual rental income, this also ensures that income is secured by agreeing formal leases with tenants at market rents.

The council has an ongoing programme of disposal of assets identified through asset rationalisation and the release of surplus assets. Disposal channels include sale on the open market, private treaty, auction and community asset transfer (see Disposals, Investment and Acquisitions policy in Appendix 7). The disposal programme is informed by the Disposals Strategy (Appendix 8) which ensures that the disposal

programme delivers the financial, risk mitigation and regenerative requirements of the council.

Investment Property

The council owns a portfolio of income generating properties which currently creates an annual revenue income stream to the council of over £1.25 million.

Current property investments include:

- Saddlers Centre
- Primark and Co-op
- Community shopping parades
- Ground leases

Corporate Landlord is working with Finance to prepare an Investment Strategy for the council as part of the council's Capital and Investment Strategy. The Investment Strategy will set out the council's approach to the management of its investment property portfolio including criteria, governance and requirements for the acquisition and disposal of investment assets.

Optimising Assets

Optimising Assets is our forward-looking programme, which aligns to PROUD ways of working, building on the work of the Smarter Workplaces programme that it supersedes.

The key drivers for the programme are set out below:

- Closing the buildings that we don't need - operating efficiently within the office buildings that we need and disposing of the buildings we don't.
- Addressing the essential maintenance needs of our remaining buildings through a formal planned maintenance programme designed to address ongoing maintenance requirement and planned capital investment.
- Complying with statutory regulations - ensuring that actions are taken to ensure that buildings are compliant with statutory obligations in respect of Fire, Legionella and Asbestos.
- Optimising income - protecting existing income streams from assets and investing in buildings where additional income can be generated.
- Using less energy - improving energy efficiency in our offices and other buildings and reducing running costs.
- Enabling more efficient team-working - working more flexibly within our buildings, through promotion of agile working, and providing modern fit-for-purpose workplaces.
- One Public Estate – collaborative working with Public Sector providers on strategic planning and management of their land and buildings as a collective resource.
- Serving our customers more efficiently - focusing on what our customers want and need, using better accessible and inclusive facilities to serve them.

Measuring Our Performance

To manage the council's assets effectively and efficiently Corporate Landlord needs to know how they are performing. To do this we use a selection of measures, covering performance in utilisation, cost and income. These measures are to be a standing item on the Corporate Landlord Board's agenda and feed into the Asset Challenge process.

Challenging Our Assets

Asset Challenge is an embedded process, which means that Corporate Landlord will be reviewing all of the council's asset portfolio on a continuous rolling programme. This ensures that only those assets that are needed are retained. The ultimate aims of Asset Challenge are to reduce costs, identify assets that should be retained for use and/or invested in, identify those that are surplus to requirements and therefore can be disposed of.

To do this, each asset is assessed using a step-by-step challenge process beginning with up to date building condition data, ensuring that every asset has been fundamentally tested against a common set of criteria. The outline challenge process is set out below:

| | |
|---------------------------------|---|
| Strategic Purpose | <ul style="list-style-type: none"> • Why do we have the asset? • What is its strategic purpose? • Who is accountable for performance of it? • What do we expect of it? • Is this financial, non-financial or both? • How would we know when this is being achieved? |
| Opportunities and Risks | <ul style="list-style-type: none"> • Are there any opportunities that could be exploited? • Are there any known barriers to exploiting these opportunities? • Are there any risks that could be faced? |
| Performance Appraisal | <ul style="list-style-type: none"> • What financial and non-financial outcomes have been delivered? • Can non-financial benefits be quantified, or are they qualitative? • What are the management costs? • Are there any invisible costs? |
| Option Appraisal | <ul style="list-style-type: none"> • Balance of performance, opportunities and risks • What options are available? • What are the relative costs and benefits of these options? • Do any options carry increased risks? |
| Pre-implementation Consultation | <ul style="list-style-type: none"> • Internal Stakeholders • External Stakeholders and Partners |
| Outcome | <ul style="list-style-type: none"> • Retained • Replaced / Remodelled / Re-used • Disposed (Open Market or Asset Transfer) |

The asset challenge process works in parallel with the ongoing quantitative assessment of the council's occupational property needs for service delivery to ensure that the council's portfolio is optimised and provides the right property in the right location at the right cost.

Where the Asset Challenge process identifies potentially surplus assets, those assets will be considered in the context of the Disposal Strategy and, if appropriate, included in the disposal programme. Assets identified for disposal by the Disposal strategy will be taken through the disposal process as outlined in the Disposal, Investment and Acquisition Policy (see Appendix 7). The council is aware of the Government's extended right to challenge which impacts on the disposal by local authorities of surplus land and property assets and the disposal programme aims to respond to this requirement.

Climate Change

In October 2020 a Cabinet decision was taken to adopt a programme that would make the council carbon neutral by 2050.

A policy framework and an initial action plan followed on from the council's previous decision to declare a climate emergency in September 2019. The first phase of the action plan covers a five-year period and can be found at [Walsall Climate Emergency Action Plan.pdf](#)

The council will play a key role working alongside regional partners to tackle climate change. In order to meet the net zero target, the council must ensure that reducing emissions and increasing resilience is central to its work, embedded within strategy and day-to-day delivery.

Targets defined for Corporate Landlord are detailed within Section 2 of the action plan.

Regeneration and Housing

Regeneration is one of the central aims of the council's Corporate Plan and there are significant opportunities for the council's land and property portfolio to support these strategic aims. The Corporate Landlord service works closely with the Regeneration and Housing team to maximise the regenerative potential of the council's assets for the benefit of the borough.

Strategic regeneration schemes are not limited to council-owned assets, and Corporate Landlord provides strategic professional advice to the Regeneration and Housing team to support the delivery of the pipeline of regeneration schemes alongside external strategic advisors.

Working with Partners

We are active members of the One Public Estate programme, working closely with other Public Sector organisations across the borough to explore opportunities to reduce premises costs and make assets work better for our communities and customers.

We are also working with the West Midlands Combined Authority, exploring opportunities for shared services and how our assets may be able to support this.

The strategic objectives of the One Public Estate programme are to:

- Provide improved joined-up and customer-focussed services - enabling greater collaborative working across public service providers in the borough to support individuals, families and communities.
- Provide improved access to public services in the borough - reducing demand and avoidable customer contacts.
- Deliver public service efficiency savings - through greater service integration and new delivery models, supporting service demand management approaches.
- Deliver greater savings in running and maintenance costs - through sharing public service buildings.
- Work closely with community organisations - optimising the use of assets where most benefit can be realised.
- Contribute to wider economic, social and environmental outcomes for the borough - for example, cutting carbon emissions in the borough and engaging in initiatives across the Combined Authority area.
- Create standard practices for performance measurement - reviewing the metrics for building occupancy and space utilisation, void properties and rent levels across the borough.

Finally, we are engaging with our Health Colleagues through a Local Estates Forum across the borough area. This is a strategic forum with executive representation from all organisations across Health and Social Care in Walsall.

Engaging with our Communities

Walsall has a vibrant and diverse voluntary and community sector which includes a wide range of community organisations offering a variety of activities/services/events to local residents. Our Community Organisations, within our Resilient Community Model, have been the backbone of the council's community response to the COVID-19 Pandemic. Our buildings have been used extensively in the council's response and our Community Organisations delivered the response from them. Our approach to the future will always be mindful of the need to support communities in times of crisis as well as the benefits of their everyday activities. This particularly applies to our Community Associations who, despite the unknown risks of the early days of the pandemic, still delivered face to face services as part of our support for the clinically extremely vulnerable and vulnerable residents of Walsall.

Voluntary and community organisations occupy over 50 council owned properties, often at reduced or minimal rents, or preferential terms. We have also transferred buildings to local organisations who run them successfully for the benefit of their local communities. These arrangements range from informal agreements and short-term licences to long leases. The council has adopted a Community Asset Transfer Policy (CAT) to establish a process for the transfer of surplus council buildings to community organisations in cases where there is a need in the locality. The pilot CAT is progressing and is expected to complete before the end of the 2021/22 financial year.

Local people are often best placed to manage community facilities in their area. They already make extensive use of these assets and their local knowledge and hands-on

management often results in lower overheads and better value-for-money. Community organisations also use volunteers and take great pride in their local area.

Managing these facilities can help to empower local communities and can bring opportunities for greater independence and financial sustainability. When done well, CAT can create lasting change in local neighbourhoods.

We are fully committed to using our assets to form long-term partnerships with suitable community organisations, to create stronger, more cohesive and more sustainable communities. The council is committed to formalise agreements with community organisations which occupy council buildings on an informal basis, for the benefit of both the council and the occupying community organisation.

Working in partnership with the Resilient Communities directorate we will support the use of appropriate facilities and take into account the wider benefits delivered by community groups in our decisions and support.

Supporting our Service Areas

In support of service areas across the council and external partners, the strategy will enable and facilitate service transformation by maximising the use of assets across the Public Sector. Examples of these include:

Health and Social Care: The linking of Health and Social Care has resulted in the council and Public Sector partners examining how these services are accessed and delivered, alongside the effectiveness of different facilities. Moving forward, we are looking at a more modern approach, providing us with opportunities to re-assess the use and occupation of associated property in alignment to asset rationalisation.

Children's Services Locality Hubs: Corporate landlord has been working actively with Children's Services to identify appropriate buildings within the council's portfolio to establish locality hubs to allow better integration with service users across the borough.

Relocation of the services from their existing premises into appropriate locations to release valuable assets for disposal.

Community Associations: Engagement with Community Associations to support them in maintaining provision of activities at and delivery of essential services from council-owned Community Buildings. Dialogue has been maintained with Community Associations and moving forward, we are looking at entering into lease arrangements to provide certainty of occupation for Community Associations to address some of the issues raised.

New investment property: the council currently holds a limited number of income generating investment properties which generate income streams to contribute to the council's revenue budgets. An Investment Strategy is under preparation which will seek to establish the governance, process and criteria to allow the council to grow its investment portfolio in an appropriate manner, taking into account the availability of capital funding and acceptable levels of investment risk.

Our Forward Plan

This document outlines the key strategic objectives for the council's land and buildings over the next three years. Our Asset Management Action Plan further describes the specific activities to achieve these objectives, categorised under three key thematic headings of Strategic, Operational and Service Improvement actions.

The Asset Management Strategy will be reviewed annually, whilst the Asset Management Action Plan will be managed, monitored and updated continuously to report on progress and achievements. This means that the document will be continually changing to reflect achievement of actions and capturing new priorities and initiatives as they are identified.

ASSET MANAGEMENT ACTION PLAN

A. Action Plan – Strategic

| Action Reference Number | Action Description | Key Asset Management Strategic Objective | SMART Objective | Key Milestones | | | Accountability | Resource Implications |
|-------------------------|--|--|---|--|---|---|--|--------------------------------|
| | | | | 2022/23 | 2023/24 | 2024/25 | | |
| A1 | Review of Investment property holdings | To manage and maintain property effectively, efficiently and sustainably, together with optimising financial return and commercial opportunities | By 31 March 2023, complete annual review of existing investment properties to understand positioning of the asset within the market and consider options for disposals, in line with the Capital Investment Strategy. | Annual review of investment property assets | Annual review of investment property assets | Annual review of investment property assets | Corporate Landlord Board | Internal and external resource |
| A2 | Asset Challenge - Rationalisation of the council's Asset Portfolio - identification of sites for regeneration, housing, co-location and disposal | To provide the right property, fit for purpose, in the right place, to meet current service need and plans for the future | By 31 March 2023 support the council's disposal programme through asset challenge and rationalisation of the asset portfolio | Working with the Strategic Partner, Complete Phase 1 of the Land and Buildings Asset Challenge – categorising assets into Dispose, retain, Replace / Remodel / Reuse | Commence implementation phase of outcomes of the Land and Buildings Asset Challenge | | Corporate Landlord Board | Internal and external resource |
| A3 | Disposals Programme Management | To plan and manage property as a corporate resource for the benefit of the people of Walsall | By 31 May 2022 prepare and approve the disposal programme for 2022/23 in conjunction with the council's Disposals Strategy | Complete disposals within programme for 2022/23 Confirm disposal programme for 2023/24 | Complete disposals within programme for 2023/24 Confirm disposal programme for 2024/25 | Complete disposals within programme for 2024/25 Confirm disposal programme for 2025/26 | Corporate Landlord Board | Internal resource |
| A4 | Implementation / use of Community Asset Transfer (CAT) | To plan and manage property as a corporate resource for the benefit of the people of Walsall. | By 30 September 2022 complete the review of the CAT policy following lessons learned from pilot disposal. | Review the CAT policy and seek Cabinet approval to amendments to policy (as necessary). | Agree the programme for the disposal of assets via CAT by year end | Complete CATs for relevant assets where applicable | Corporate Landlord Board | Internal resource |
| A5 | Implementation of Climate Emergency Action Plan (including Carbon Reduction Commitment) | To manage and maintain property effectively, efficiently and sustainably, together with optimising financial return and commercial opportunities | By 31 October 2022 have in place an Energy Strategy to minimise energy demand, supply remaining requirements efficiently and reduce carbon emissions | Undertake energy audits of selected property assets. Seek external funding opportunities for energy efficiency projects. | Undertake energy audits of selected property assets. Seek external funding opportunities for energy efficiency projects. | Undertake energy audits of selected property assets. Seek external funding opportunities for energy efficiency projects. | Corporate Landlord Board Clean & Green | Internal Resource |
| A6 | Preparation of performance regime managed through Corporate Landlord Board | To plan and manage property as a corporate resource for the benefit of the people of Walsall. | By 31 July 2022 agree a suite of asset performance metrics for presentation to Corporate Landlord Board | Develop asset performance dashboards to meet requirements of Corporate Landlord Board and CMT | | | Corporate Landlord Board | Internal resource |
| A7 | Review contribution of assets to the Regeneration Agenda | To plan and manage property as a corporate resource for the benefit of the people of Walsall. | By 31 March 2022 formalise engagement with Regeneration Housing and Economy in identifying how assets can influence and be a catalyst for change | Formalise a route for dialogue and collaboration with Regeneration, Housing and Economy. | | | Corporate Landlord Service Regeneration Housing and Economy | Internal resource |

| Action Reference Number | Action Description | Key Asset Management Strategic Objective | SMART Objective | Key Milestones | | | Accountability | Resource Implications |
|-------------------------|-------------------------|---|---|--|--|--|---------------------------------------|--------------------------------|
| | | | | 2022/23 | 2023/24 | 2024/25 | | |
| A8 | PPE Valuation Programme | To plan and manage property as a corporate resource for the benefit of the people of Walsall. | By 31 March 2023 determine asset valuations programme and complete valuations | Successful completion of valuations of agreed assets and successful external audit | Successful completion of valuations of agreed assets and successful external audit | Successful completion of valuations of agreed assets and successful external audit | Corporate Landlord Service Finance | Internal and External Resource |

B. Action Plan – Operational

| Action Reference Number | Action Description | Key Asset Management Strategic Objective | SMART Objective | Key Milestones | | | Accountability | Resource Implications |
|-------------------------|--|---|--|---|---|--|--|--------------------------------|
| | | | | 2022/23 | 2023/24 | 2024/25 | | |
| B1 | Corporate landlord CAFM system introduction | To plan and manage property as a corporate resource for the benefit of the people of Walsall. | By October 2023 CAFM system will be fully operational, enabling access to live asset performance data | Following procurement of system, fully map system to combine all corporate landlord property and asset functions and module configuration and implementation plan, data migration plan, write procedures and process maps | Complete implementation and testing of system. Data transfer and validation process, audit outputs to ensure accuracy, Train all staff in the use of the system. Modules introduction and operational measured against programme throughout the year | Fully operational and embedded into the councils procedure | Corporate Landlord Service | Internal and External Resource |
| B2 | Corporate Asset Management Fund | To manage and maintain property effectively, efficiently and sustainably, together with optimising financial return and commercial opportunities. | By 31 March 2022 identify schemes, commission works and manage delivery of prioritised statutory and maintenance requirements for Corporate Buildings | Prepare Capital Funding requests for the next 3-5 years within the Medium Term Financial Plan Manage and report on 2022/23 CAMF | Manage and report on 2023/24 CAMF | Manage and report on 2024/25 CAMF | Corporate Landlord Service (IFM) Finance | Internal Resource |
| B3 | Schools Capital Programme | To manage and maintain property effectively, efficiently and sustainably, together with optimising financial return and commercial opportunities. | Identify schemes, commission works and manage delivery of prioritised statutory and maintenance requirements for Schools | Manage and report on 2022/23 Schools Capital Programme Prepare Capital Funding requests for 2023/24 programme | Manage and report on 2023/24 Schools Capital Programme Prepare Capital Funding requests for 2024/25 programme | Manage and report on 2024/25 Schools Capital Programme Prepare Capital Funding requests for 2025/26 programme | Corporate Landlord Service (Commissioning) Children's Services Finance | Internal Resource |
| B4 | Statutory Compliance function (fire, asbestos, legionella, contract management) | To manage and maintain property effectively, efficiently and sustainably, together with optimising financial return and commercial opportunities. | Ongoing reassurance of WMBC compliance with all building related statutory regulations | Complete and effectively record all statutory compliance activities required by building related statutory regulations | Complete and effectively record all statutory compliance activities required by building related statutory regulations | Complete and effectively record all statutory compliance activities required by building related statutory regulations | Corporate Landlord Service (IFM) | Internal and External Resource |
| B5 | Statutory Compliance function (fire, asbestos, legionella, contract management) - CAFM | To manage and maintain property effectively, efficiently and sustainably, together with optimising financial return and commercial opportunities. | Ongoing reassurance of WMBC compliance with all building related statutory regulations | CAFM system to include statutory compliance moving forward as part of the implementation including inspection regime | Migrate data, test configured system for outputs and auditability | Fully implemented CAFM based management of system including electronic data capture, validation and recording process | Corporate Landlord Service (IFM) | Internal and External Resource |
| B6 | Commercial management of Saddlers Centre | To manage and maintain property effectively, efficiently and sustainably, together with optimising financial return and commercial opportunities. | Work strategically with the Connected Gateways delivery team. Maximise occupancy and income following the regeneration of the scheme through engagement with external marketing team and working with existing tenants | Market vacant retail units within the centre to maximise occupancy and minimise void costs pending the commencement of regeneration works | Market vacant retail units within the centre to maximise occupancy and minimise void costs during regeneration works | Market vacant retail units within the centre to maximise occupancy and minimise void costs during the regeneration works | Corporate Landlord Service (AM) | Internal and External Resource |
| B7 | Commercial Estate Management | To manage and maintain property effectively, efficiently and sustainably, together with optimising | By 31 March 2024 maximise occupancy and income through timely lease renewals, rent | Review leases (including service charges) and rent reviews due in 2022/23 | Review leases (including service charges) and rent reviews due in 2023/24 | Review leases (including service charges) and rent reviews due in 2024/25 | Corporate Landlord Service (AM) | Internal and External Resource |

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| | | financial return and commercial opportunities. | reviews, service charges and management of debt alongside a review of assets leased-in to WMBC | Work with tenants and income Team to reduce debt levels Identify Investment and disinvestment requirements to maximise income and reduce net cost | Work with tenants and income Team to reduce debt levels Commence quarterly performance reporting of the Commercial Portfolio | Work with tenants and income Team to reduce debt levels Undertake quarterly performance reporting of the Commercial Portfolio | | |
| B8 | Asset Stock Condition Surveys | To plan and manage property as a corporate resource for the benefit of the people of Walsall. | By 31 October 2022 complete stock condition surveys for the remaining retained corporate asset portfolio to enable targeted capital investment. | Provide initial data by a standalone system which will have data migrated to the new CAFM system | Migrate data, test configured system for outputs and auditability | Fully implemented CAFM based management of system including electronic data capture, validation and recording process | Corporate Landlord Service (IFM) | Internal Resource |
| B9 | Service area engagement | To plan and manage property as a corporate resource for the benefit of the people of Walsall. | By 31 March 2022 Corporate Landlord to collaboratively engage with service areas on their requirements and the future use of the asset portfolio | Hold regular Directorate Asset Review Group meetings with each directorate to formalise liaison between CLS and service areas | Hold regular Directorate Asset Review Group meetings with each directorate to formalise liaison between CLS and service areas | Hold regular Directorate Asset Review Group meetings with each directorate to formalise liaison between CLS and service areas | Corporate Landlord Service (AM / Office Moves) | Internal Resource |
| B10 | Contract Management | To plan and manage property as a corporate resource for the benefit of the people of Walsall. | | After selection embed CAFM, technical advisors and contractors and monitor performance. | By the end of the financial year report on CAFM successes/failure, Technical advisor performance and retention retender recommendation report, Contractors performance and retention or tender recommendation report | Ongoing monitoring and management of all contracts | Corporate Landlord Service (IFM) | Internal Resource |

C. Action Plan – Service Improvement

| Action Reference Number | Action Description | Key Asset Management Strategic Objective | SMART Objective | Key Milestones | | | Accountability | Resource Implications |
|-------------------------|--|---|--|---|---|---|---|--------------------------------|
| | | | | 2022/23 | 2023/24 | 2024/25 | | |
| C1 | Relocation of Children's Services ORS team | To provide the right property, fit for purpose, in the right place, to meet current service need and plans for the future | By 30 April 2022 relocate Children's Services ORS team from The Hollies | Plan and undertake required physical adaptations and relocate service. | | | Corporate Landlord Service (Office Moves / AM) Children's Services | Internal and External Resource |
| C2 | Establishment of Children's Services Localities Hubs | To provide the right property, fit for purpose, in the right place, to meet current service need and plans for the future | By 30 June 2022 complete the establishment of 3 locality hubs in Brownhills, Birchills and Blakenall | Plan and undertake required physical adaptations and relocate service. | | | Corporate Landlord Service (Office Moves / AM) Children's Services | Internal and External Resource |
| C3 | Schools Expansions | To provide the right property, fit for purpose, in the right place, to meet current service need and plans for the future | | Delivery of programmed schools expansion schemes for September 2022 | Delivery of programmed schools expansion schemes for September 2023 | Delivery of programmed schools expansion schemes for September 2024 | Corporate Landlord Service (Commissioning) Children's Services | Internal and External Resource |
| C4 | SEND review and provision of additional places | To provide the right property, fit for purpose, in the right place, to meet current service need and plans for the future | | Preparation of options appraisals with Delivery Partner to identify opportunities within the estate for creation of additional temporary and permanent places. Delivery of initial temporary places for September 2022. | Delivery of selected options for creation of additional places for September 2023 | Delivery of selected options for creation of additional places for September 2023 | Corporate Landlord Service (Commissioning) Children's Services | Internal and External Resource |
| C5 | Review of Community facilities | To provide the right property, fit for purpose, in the right place, to meet current service need and plans for the future | By 31 October 2022 review occupation of community buildings to understand costs and identify opportunities to formalise occupation | Undertake review of occupation of community buildings and commence process of formalising occupation of selected properties. | Continue process of formalising occupation of selected properties. | Continue process of formalising occupation of selected properties. | Corporate Landlord (AM) Communities | Internal and External Resource |
| C6 | Blended working – redesign of Civic Centre and Council House | To provide the right property, fit for purpose, in the right place, to meet current service need and plans for the future | By 31 December 2022 plan, design and implement the required changes to the working environment to support blended working | | | | Corporate Landlord (Office Moves) | Internal and External Resource |
| C7 | Future use of former Sneyd School | To plan and manage property as a corporate resource for the benefit of the people of Walsall. | By 31 October 2022 complete review with external consultant of options for the future use or disposal of Sneyd School | Feasibility study of available options for future use of Sneyd School Seek approval for option for future use of Sneyd School and commence implementation | Implementation of chosen option for Sneyd School | | Corporate Landlord (AM) | Internal and External Resource |
| C8 | Future Use of EDC | To plan and manage property as a corporate resource for the benefit of the people of Walsall. | By 31 October 2022 complete review with external consultant of | Feasibility study of available options for future use of EDC | Implementation of chosen option for EDC | | Corporate Landlord (AM) | Internal and External Resource |

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| | | | options for the future use of EDC | Seek approval for option for future use of EDC and commence implementation | | | | |
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APPENDIX 1 - CORPORATE LANDLORD APPROACH

APPENDIX 2 – ACCOMMODATION POLICY

APPENDIX 3 - PROPERTY MAINTENANCE POLICY AND STRATEGY

APPENDIX 4 - MAJOR PROJECTS MANUAL

APPENDIX 5 - RESPONSIBILITIES DOCUMENT – SERVICE
DIRECTORATES

APPENDIX 6 - RESPONSIBILITIES DOCUMENT – MAINTAINED SCHOOLS

APPENDIX 7 - DISPOSAL, INVESTMENT AND ACQUISITION POLICY

APPENDIX 8 - DISPOSAL STRATEGY