



more for York



Blueprint for Property Services

Draft v 0.1

City of York Council

September 2009

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Background

Property

The value of council property assets, excluding the council housing stock of c. 8,000 dwellings, all roads and footpaths, exceeds £295million. In addition to operational and administrative accommodation it also includes, among others,

- The Bar Walls
- 185 commercial properties.

The current housing stock has a value of c. £380m.

Corporate Landlord

The role of Corporate Landlord was fully established in 2003 following a best value review and clearly established responsibility for strategic asset management. Whilst the Corporate Landlord and the Corporate Asset Management Group (CAMG) have had a significant impact upon the management of the property assets, the Audit Commission have interpreted that impact as 'influential' rather than 'directive'.

Currently, asset management activity is undertaken corporately and independently across several directorates. Not all activity is carried out in a collaborative style and therefore, this reduces the opportunity for efficient, effective and compliant management of assets

Property Services Department

The department sits within the Chief Executive's Directorate but has, for the last eight months, operated under City Strategy as part of temporary arrangements.

The Property Services department is headed by an Assistant Director, otherwise referred to as the Corporate Landlord, and is split into three functional areas:

1. Asset and Property Management
2. Facilities Management*
3. Strategic Business and Design

Each functional area is headed by a service manager.

As the Head of Facilities Management has been moved to the role of Project Director for the new Council HQ, responsibilities have passed to Head of Asset and Property Management and the Head of Strategic Business and Design.

*This is repair and maintenance, compliance and some clienting of cleaning contracts and not the definition of FM used in this blueprint.

Other Directorates and Departments

There is staff resource allocated to the management of property related assets in the following directorates:

- LCCS
- HASS
- City Strategy
- Neighbourhoods

Property Vision

- Corporate and strategic management of all land and property assets, from a single point within the organisation, in support of service provision to the customer and our communities.
- Decision making should be corporate, fully informed, responsive to proven and established need and supported by a business case to ensure that the council holds and develops a value for money, compliant and fit for purpose asset base.
- Managing change in a collaborative way through enabling, commissioning, implementing and managing investment in both new and existing property assets, and disposal of surplus assets to sustain and improve service provision to the customer and our communities.
- In reaching the vision we will be fully compliant with recent Audit Commission recommendations and with CAA resources assessment as a key line of enquiry

Principles

Working in partnership with our colleagues, stakeholders and citizens

- Partnership with our customers to identify and understand their requirements.
- “One Team” approach within the council to deliver our customer requirements.
- Being driven by performance indicators aligned to priorities.
- Focus on continuous improvement through actively seeking feedback and acting upon it.

Objectives

- Strategic approach to asset management based on an analysis of need, to deliver strategic priorities, service needs and intended outcomes
- Clear and corporate decision making process for the effective use of assets
- Asset based management to ensure that assets are fit for purpose, compliant and provide value for money
- Work with partner organizations to maximise the use of assets for the benefit of the local community
- Establish “value added” performance indicators.
- Focus upon technical and financial performance
- Better communication and information management
- Clear commissioning and delivery mechanisms for services
- Efficient and re-engineered business processes
- Provision of high quality centrally managed facilities management services
- High performance commercial portfolio

Business Cases

To deliver the vision, four specific work areas have been identified.

Business Case 1 – Facilities Management

Strategic Fit

This proposal contributes to the authority's overall business strategy by providing the following;

- An efficient and cost effective model for the provision of both “hard”(maintaining the property) and the “soft” (managing the environment) facilities management services for administration accommodation, now and for the new HQ solution, these services are shown in Appendix 8
- An efficient and cost effective model for the provision of both “hard” & “soft” FM services to other council land and buildings, including those of a specialist nature
- An efficient and cost effective model for the provision of both “hard” and “soft” FM services to schools (optional buy in)
- Land and property assets that are fit for purpose, well maintained and compliant

Objectives – what will the service look like?

To deliver the promises of the property vision by 2012 for Facilities Management, the following key objectives will be achieved

- Core business services to focus wholly upon delivery to the customer
- All physical land and property assets are fit for purpose, compliant and support delivery of services to customers
- Investment in the repair and maintenance of assets is sustainable and compliments the strategic intention and plan for asset use.
- Corporate Landlord responds to and informs collaborative decision making on the strategic use of assets

Options Appraisal

The options considered are:

1. Retain existing arrangements
2. Central control of facilities management services delivered through an in-house provider

3. Central control of facilities management services delivered through an external provider

Option 1

This option is discounted

This will not improve the service or release any efficiency savings.

Option 2

This option is acceptable subject to Neighbourhood Services ability to demonstrate improved levels of performance to a standard that generates comparable savings with those identified in option 3

Option 3

This is the preferred option

This will improve the service and release the efficiency savings. Benchmarking with other comparable authorities has suggested that a saving of 10 – 15% would be achieved by 2012. Current analysis suggests this would equate to £495k using current available information.

Commercial Aspects

An OJEU procurement process would need to be followed.

Service provision could be split into up to three lots

- The administrative accommodation HQ solution
- All other properties
- Schools

A longer- term contract of between 7 and 10 years would bring about the greatest benefits

Affordability

All costs incurred in the life of the project are to be covered by efficiency savings generated by the project. An investment of £100k is anticipated for delivery of this project.

Achievability

The preferred option follows working practice in other similar authorities. The overall changes are viewed as low risk. A market exists to provide these services, either as individual packages or in totality.

Risks

- Accuracy of the baseline figures is still to be ratified
- Adequacy of current resources to meet expected standard of service provision
- The vision of facilities management may not be corporately accepted resulting in limited efficiency gains
- Schools not buying into a longer term contract

Source Information

The Larch Report
Croydon Council
Welsh Assembly
Ealing Council
Without Walls

CMT Decision: To aggregate requirements and market test the Facilities Management function, both Hard & Soft.

Business Case 2 – Delivering Change through Design Services

Strategic Fit

This proposal contributes to the Authority's overall business strategy by providing the following;

- An intelligent client that would act as the professional, operational and technical interface between the Customer, Decision Making and Delivery.
- To provide the planning, enabling, commissioning and management of change function to land and property assets.
- To have a menu of appropriate delivery options for the council's varied programmes of change

Objectives – what will the service look like?

To deliver the promises of the property vision by 2012 for Managing Change to the Land and Property Portfolio, the following key objectives will be achieved

- A clear understanding of the following roles for the implementation of change to the council's assets
- An intelligent client – enabler commissioner
- A fully resourced and cost effective delivery option(s)

- A collaborative approach to implementation across the whole council, to avoid duplication

Options Appraisal

The options considered are:

1. Retain existing arrangements
2. An established enabler-commissioner with central control of an in-house provision of professional and technical services
3. An established enabler-commissioner with central control of external provision of professional and technical services
4. An established enabler-commissioner with central control of an appropriate mix of in-house and external provision of professional and technical services

Option 1

This option is discounted

This will not improve the service or release any efficiency savings.

Option 2

This option is discounted

The current in-house provision does not currently provide the full extent of services required. The cost of extending and recruiting to the service would be prohibitive.

Option 3

This would be an acceptable option

This will improve the service by maintaining professional standards through peaks and troughs of demand.

Release efficiency savings through a reduction in management, overheads, accommodation and ancillary costs in the order of £27k. This is only a marginal revenue saving because most of the design work is funded through capital programmes.

If this was extended to other similar technical services i.e. highways engineering, further marginal savings could realistically be achieved.

This option removes the risk of an increase in revenue costs should the capital programmes reduce to an unsustainable level.

A significant reduction in the capital programme would render this option less attractive to the market place.

Option 4

This is an option worth consideration

This will improve the service by maintaining professional standards through peaks and troughs of demand.

Release efficiency savings through a reduction in management, overheads, accommodation and ancillary costs of around £10k.

If this was extended to other similar technical services i.e. highways engineering, further savings could realistically be achieved.

This option retains an element of risk in the event that capital programmes reduce to an unsustainable level which may result in an increase in revenue costs.

CMT Decision:

To implement an Enabler-Commissioner function for Professional and Technical services.

To investigate options 3 and 4, via market testing, to ensure efficiency and service improvements are realised.

Commercial Aspects

Awaiting CMT decision

Affordability

All costs incurred in the life of the project are to be covered by efficiency savings generated by the project.

Achievability

Option 3 and 4 are achievable subject to the delivery option appraisal and the successful procurement of the delivery solution.

Risks

Partnership or shared service with another authority may not save the management, overheads, accommodation and ancillary costs.

The market may not respond to the procurement exercise if the business is deemed not attractive enough.

Source Information

Initial in-house benchmarking.

Business Case 3 – Strategic Asset Management

Strategic Fit

This proposal contributes to the Authority's overall business strategy by providing the following;

- A high profile and 4* management of land and property assets
- Service focussed upon customer and community needs
- In-house management supported by a single readily available professional specialist support framework
- Central control and direction for:
 - Strategic planning and decision making
 - All land and property assets
 - Allocation of limited resources
- Less assets – greater quality – lower costs
- Co-ordinated and collaborative implementation, including reinforcing relationships with external partners to benefit communities

Objectives – what will the service look like?

To deliver the promises of the property vision by 2013 for Strategic Asset Management, the following key objectives will be achieved;

- Member/Officer champions and Asset Board
- Central control, prioritisation and allocation of resources
- Collaborative and informed decision making
- Responsive to proven and established need
- Collaborative implementation
- 'Less is more' – efficient and fit for purpose assets
- Reduced asset running costs
- Generate capital receipts
- More focussed investment
- A value for money, compliant and fit for purpose asset base.

Options Appraisal

The options considered are:

1. Retain existing arrangements
2. Implement a more strategic approach to asset management

Option 1

This option is discounted

This will not improve the service or release any efficiency savings.

This will not meet compliance requirements recommended by the Audit Commission or CAA guidelines

Option 2

This is the preferred option

This will provide;

- Corporate and strategic management of all land and property assets, from a single point within the organisation, in support of service provision to the customer and our communities.
- Decision making that is: corporate, fully informed, responsive to proven and established need and supported by a business case ensuring that the council holds and develops a value for money, compliant and fit for purpose asset base.
- Compliance with recent Audit Commission recommendations and with CAA guidelines
- A Land and Property portfolio that is “Less assets - greater quality - lower unit costs” will generate efficiency savings of around 19% over 10 years (a target of 10% less buildings and 10% reduction in premises unit cost)
- A further review of the Commercial Property Portfolio, with regard to its purpose and direction. Options to be appraised and reported to Executive for consideration.
- A more efficient and focussed management of land and property assets. Removal of duplication of resource across the organisation would generate efficiency savings

CMT Decision:

To approve the establishment of an Executive Champion and Asset Board (to include the Corporate Landlord, Chief Finance Officer and Housing Landlord)

Executive Decision:

Review the Commercial Portfolio

Commercial Aspects

Further investigation following CMT/Executive decision

Affordability

All costs incurred in the life of the project are to be covered by efficiency savings generated by the project.

Achievability

The preferred option follows established good practice in government guidelines and other similar authorities.

Risks

The overall changes are viewed as low risk.

Source Information

Audit Commission
CAA guidelines

Business Case 4 – Management of the existing land and property portfolio

Strategic Fit

This proposal contributes to the authority's overall business strategy by providing the following;

- A collaborative and corporate approach to the collection, collation, storage and management of asset information;
- All information readily accessible in user appropriate formats;

- All information supportive of decision making and enquiry;
- Protocol and processes in place for ongoing management of property information;
- Clear understanding of legal and statutory responsibilities and obligations of owning assets;
- All assets fit for purpose and compliant;
- Clear understanding of investment needed to maintain /achieve standards and fitness for purpose;
- All processes and systems to support the above have been reviewed and re-engineered to be efficient, effective and accessible;
- That all of the above is ICT supported.

Objectives – what will the service look like?

To deliver the promises of the property vision by 2012 for Management of existing land and property portfolio, the following key objectives will be achieved;

- Single point of access
- Comprehensive up to date data and information on all aspects of assets
- Sufficient information to support decision making
- Comprehensive advisory service
- Evidence of compliance
- Evidence of meeting statutory and legal obligations
- An efficient system for the collection, collation, storage and management of data and information in all relevant formats
- Reduced risk
- All assets registered – Land Registry
- Possible links with PCT, Police and Fire services and other local authorities
- Appropriate levels of investment in processes and ICT

Options Appraisal

The options considered are:

1. Retain existing arrangements
2. Implement a more strategic and collaborative approach to the management of all land and property assets in terms of information, legal and statutory obligations and compliance.

Option 1

This option is discounted

This will not improve the service or release any efficiency savings.

This will perpetuate the disparate nature of land and property information and data management across the authority.

This will not meet compliance requirements recommended by the Audit Commission or CAA guidelines

Option 2

This is the preferred option

This will contribute to;

- Corporate and strategic management of all land and property assets, from a single point within the organisation, in support of service provision to the customer and our communities.
- Decision making that is: corporate, fully informed, responsive to proven and established need and supported by a business case ensuring that the council holds and develops a value for money, compliant and fit for purpose asset base.
- Compliance with recent Audit Commission recommendations and with CAA guidelines
- A more efficient and focussed management of land and property assets, data and information. Removal of duplication of resource across the organisation would generate efficiency savings of up to 20%. (The extent of the resource employed currently across the authority is still to be fully identified, if it is assumed that it would save c. £50k)

CMT Decision:

To create & maintain a single asset register.

Affordability

All costs incurred in the life of the project are expected to be covered by efficiency savings generated by the project.

ICT interface and consolidation software could prove to be expensive. Further investigation required.

Only 20% of current land and property is registered with the Land Registry. Investment needed to bring this up to 100%. Enquiries could then be re-

directed to Land Registry that would release current resource to focus on issues identified elsewhere in this blueprint.

Achievability

The preferred option follows established good practice in government guidelines and other similar authorities.

Risks

The overall changes are viewed as low risk.

Source Information

Audit Commission

CAA guidelines

Service & Business Plan 2009/10 – Property Services and related Directorates

The Re-alignment of Property Services documentation

The review of the commercial portfolio undertaken in 2008

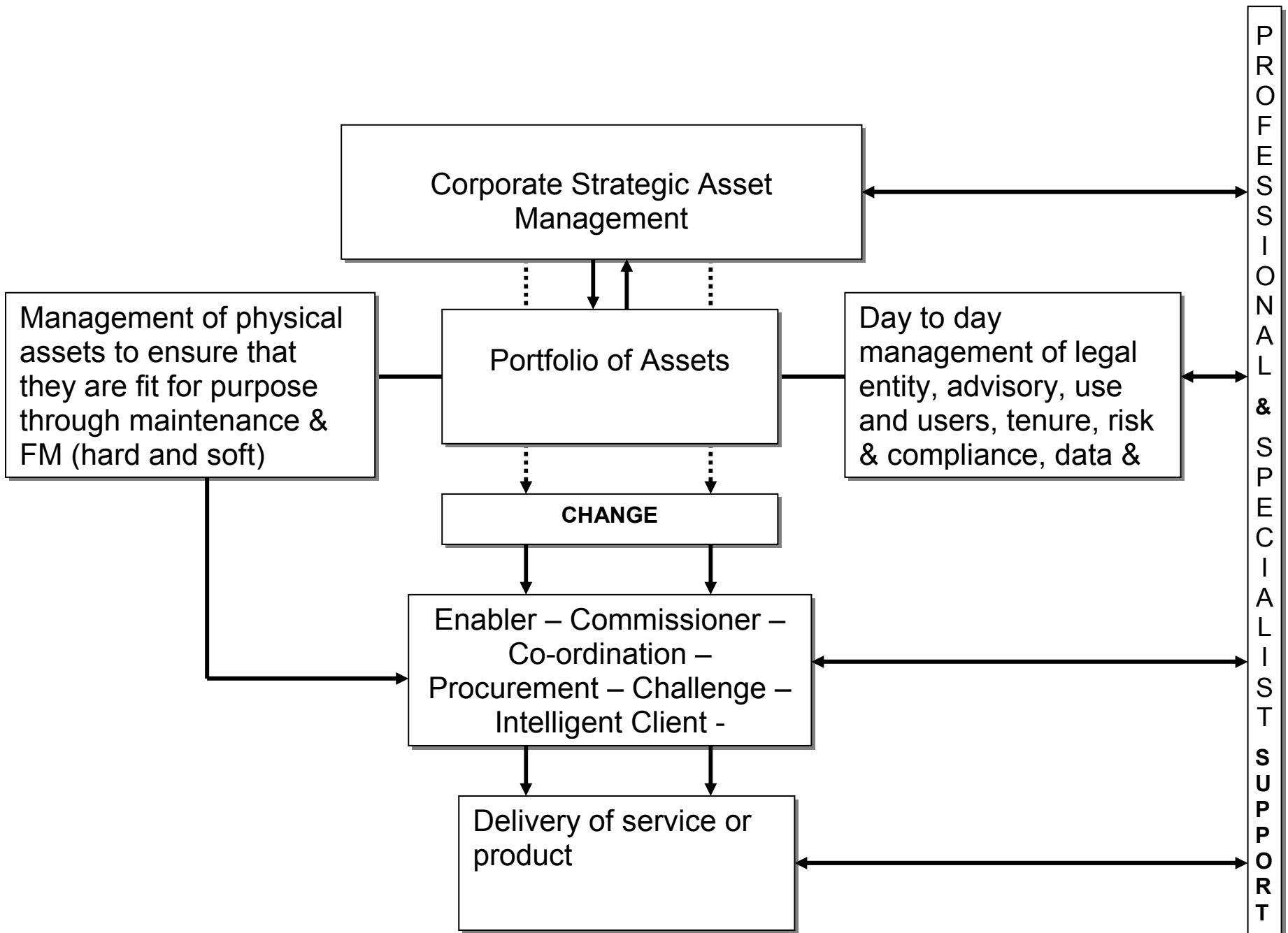
The review of FM services undertaken as part of the business plan for the new Council HQ solution

The Corporate Asset Management Plan (CAMP)

The Corporate Asset Management Group (CAMG)

The Audit Commission report on CYC Asset Management

1.



Appendix 2 :The Asset Board and reporting structure

Executive



Asset Board

Incorporating an Executive Member Asset Champion,
The Corporate Landlord,
The Chief Finance Officer,
The Housing Landlord,
And Directorate representatives (AD level)



Corporate Asset Management Working Group

Incorporating the Head of Asset and Property Management,
The Property Asset Manager
The Technical Finance Manager
And representatives from all directorate/service areas
And representatives from Partner Organisations
(Police, Fire and the PCT)

Appendix 4 – Property Communications plan– Sep 2009 to Dec 2010

TIMESCALE	ACTIVITY	TO WHOM	HOW	WHAT MESSAGE	Value
September 2009					
Key Milestone – CMT Approval					
CMT Approval			Link with programme communications	Key decisions from Property proposal	
October 2009					
Key Milestone – Exec approval of Property Plan and Delivery Process					
Executive Approval	Approval of Property and Property Services review				
Resource identification for each work stream within the project	AD Property to identify available corporate resource to work alongside NKA	ALL Directorate ADs	E-Mail, group and one to one meetings	Support required to achieve outcomes	More for our Money
Ascertain Facilities Management provision across Directorates (including schools) with land and, or property responsibility to identify and measure current Hard & Soft services provided and by whom.	Develop template to enable AD's to identify all hard & soft FM services by whom, measurement and cost	ALL Directorate AD's	E-Mail, group and one to one meetings	Need to identify current FM provision / need	More for our Money

TIMESCALE	ACTIVITY	TO WHOM	HOW	WHAT MESSAGE	Value
Identify, locate and evaluate professional & technical and compliant data for all land & property assets across CYC and individual collators	Property Services to design data requirement check list and distribute	ALL Directorate AD's and CAMG	E-Mail and one to one meetings CAMG meetings	Collation of land & property information data	More for our Money
Agree aims and principles of Asset Board and KEY Members	Obtain thoughts and requirements from Directorates	Chief Executive and ALL Directorates with responsibility or use of CYC land and or, property assets	E-Mail and one to one meetings	Details of the aims, principles and delivery process of the Asset Board	More for our Money
CMT Update	Progress Report	CMT	Presentation	In or out of timescales and or aspirations of benefits	More for our Money More for our Customers
November 2009					
Key Milestone – Property Project Implementation					
Collate current FM provision information from across Directorates and determine future service requirements	Property Project Team to collate FM information provided by Directorates				More for our Money
Identify what and where data relating to property and land is held and in what format	Collate information from templates	ALL Directorates	Insist on data requirement deadline being met by ALL	Property and land data template return deadline	More for our Money
Implement Asset Board	1st meeting to agree aims, principles and delivery	Board members	Board Meeting	Details of the roles and implications of the Board	More for our Employees
Agree the 2 year plan for implementation of CAMG process including enabling & commissioning process		All CYC	Part of Programme-level communications	Detail of the plans, benefits, and implications for staff	More for our Money More for our Employees

TIMESCALE	ACTIVITY	TO WHOM	HOW	WHAT MESSAGE	Value
Agree 2 year financial benefits plan		All CYC	Part of Programme-level communications	Detail of the plans, benefits, and implications for staff	More for our Money More for our Employees
CMT Update	Progress Report	CMT	Presentation	In or out of timescales and or aspirations of benefits	More for our Money More for our Customers
December 2009					
Key milestone – Property Project Implementation					
Preparations for the publishing of OJEU notice for FM services as a part of benchmarking	Minimum 3 months work to consult fully with CYC to determine what to include and what to exclude for FM services provision	ALL Directorates	Full one to one consultations and presentation on benefits to CMT	Commission not deliver FM provision across CYC to create greater procurement strength and attract top providers	More for our Money
Investigate feasibility to align management, accessibility and ICT requirements to capture Land & property data centrally	Across ALL directorates interrogate data information within software	ALL Directorates	ICT support project	Create accessibility to all Property & Land assets data centrally to support advisory function and reduce time and costs	More for our Money More for our Employees
Identify benefits and savings from coordinated approach to data capture & provision of asset information	Identify needs and resource to centralise asset data compilation	ALL Directorates	One to one meetings	Improve access and reduce duplication of resource	More for our Money
Implement Change Management and Enabler / Commissioner processes	Define scope, aims and processes to manage asset changes through deliverers	CYC	Asset Management changes as directed by CAMG	Collaborative decision making process for the change in assets	More for our Money More for our Employees
CMT Update	Progress Report	CMT	Presentation	In or out of timescales and or aspirations of benefits	More for our Money More for our Customers More for our Employees
January 2010					
Key Milestone – Tender Document Preparation					

TIMESCALE	ACTIVITY	TO WHOM	HOW	WHAT MESSAGE	Value
Begin FM service requirement identification, agreed and populated within FM Tender Document	Collation and measurement of FM service requirements to meet ALL CYC needs	CMT	Presentation & Tender Document	Ensure ALL FM service requirements are included within Services Required Documentation	More for our Employees More for our Money
CMT Update	Progress Report	CMT	Presentation	In or out of timescales and or aspirations of benefits	More for our Money More for our Customers More for our Employees
February 2010 Key Milestone – Tender Document Preparation					
Continuation of January Key Milestone					
CMT Update	Progress Report	CMT	Presentation	In or out of timescales and or aspirations of benefits	More for our Money More for our Customers More for our Employees
March 2010 Key Milestone – Tender Document Preparation					
Finalise FM tender requirements and draft report, to CMT	Identify what services are proposed and prepare business case for FM change	CMT	Project Team	Principles, timescales financial and efficiency implications of proposed FM services	More for our Employees More for our Money
CMT Update	Progress Report	CMT	Presentation	In or out of timescales and or aspirations of benefits	More for our Money More for our Customers More for our Employees
April 2010 Key milestone – Tender Document Preparation					
Prepare OJEU notices and formulise services to be tendered as part of benchmarking process	If Exec approval is given for FM services delivery change and prepare documents to go externally to allow benchmarking	Procurement for oversight and compliance. CMT and CYC Directorates	Project team	Key changes and their implications for FM delivery	More for our Money

TIMESCALE	ACTIVITY	TO WHOM	HOW	WHAT MESSAGE	Value
CMT Update	Progress Report	CMT	Presentation	In or out of timescales and or aspirations of benefits	More for our Money More for our Customers More for our Employees
May 2010					
Key milestone – Tender Document Preparation					
CMT Update	Progress Report	CMT	Presentation	In or out of timescales and or aspirations of benefits	More for our Money More for our Customers More for our Employees
June 2010					
Key milestone – Tender Document Preparation					
CMT Update	Progress Report	CMT	Presentation	In or out of timescales and or aspirations of benefits	More for our Money More for our Customers More for our Employees
July 2010					
Key milestone – Tender Document Preparation					
Publish OJEU notice as part of benchmarking process	Sign off of OJEU and tender information for publication	Procurement	Compliant documentation	FM provision for CYC	More for our Money
CMT Update	Progress Report	CMT	Presentation	In or out of timescales and or aspirations of benefits	More for our Money More for our Customers More for our Employees
August 2010					
Key milestone – Tender Document Preparation					
CMT Update	Progress Report	CMT	Presentation	In or out of timescales and or aspirations of benefits	More for our Money More for our Customers More for our Employees
September 2010					
Key milestone – review tender replies					
Review compliant tenders for services	Project team & Procurement open tender replies and communicate to CMT	CMT	Update paper	Compliant replies	

TIMESCALE	ACTIVITY	TO WHOM	HOW	WHAT MESSAGE	Value
Begin consultation with proposed suppliers	Communicate to compliant suppliers and in-house offer	FM providers	Letter	Next stages of procurement route	
CMT Update	Progress Report	CMT	Presentation	In or out of timescales and or aspirations of benefits	More for out Money More for our Customers More for our Employees
October 2010					
Key milestone – review tender replies					
Shortlist preferred bidders for outsourced provision and begin “competitive dialogue”	Identify best bids	Project team and Procurement	Collaborative meeting	Best fit FM provision	
CMT Update	Progress Report	CMT	Presentation	In or out of timescales and or aspirations of benefits	More for out Money More for our Customers More for our Employees
November 2010					
Key milestone – review tender replies					
Continue “competitive dialogue” process and shorten preferred bidder list	Identify best bids	Project team and Procurement	Collaborative meeting	Best fit FM provision	
CMT Update	Progress Report	CMT	Presentation	In or out of timescales and or aspirations of benefits	More for out Money More for our Customers More for our Employees
December 2010					
Key milestone – award FM contract					
Award service SLA's, KPI's or contracts to best fit FM provision for CYC	Final “competitive dialogue with bidders and award contract	CMT Exec	Face to face	Award – now prepare implementation plan	More for our Employees More for out Money More for our Customers

Appendix 5 – Decision Log

	Decision	Who	When
1	To aggregate requirements and market test the Facilities Management function; both Hard & Soft	Exec	Oct 09
2	To establish a coordinated Enabler-Commissioner function (operational and technical) for delivery of projects through Professional, Technical and Contractor services	CMT	30 th Sept
3	Mrijet test provision of professional & technical services in order to ensure efficiency and service improvements are realised.	Exec	Oct 09
4	To approve the establishment of an Executive Champion and Asset Board (to include the Corporate Landlord, Chief Finance Officer and Housing Landlord).	Exec	Oct 09
5	Review current project management arrangements	CMT	30 th Sept
6	Review the Commercial Portfolio	Exec	November
7	Develop the business case for a single asset register for all land and property information in place of current disparate systems.	CMT	30 th Sept

Appendix 6 - Benefits Realisation

No		Dec	Jan	Feb	March	Total 2009/10	Year 1 2010/11	Year 2 2011/12	Year 3 2012/13	Total Improvement
N	General Fund Cost									
1	FM Saving	£ -	£ -	£ -	£ -	£ -	£ -	£495,0	£ -	£ 495,0
2	Revenue Savings	£ -	£ -	£ -	£ -	£ -	£ -	£ 27,00	£ -	£ 27,00
3	Staff Saving	£ -	£ -	£ -	£ -	£ -	£ -	£50,0	£ -	£ 50,00
	Gross									£ 572,0
	Costs									
4	Procurement					£ -	-£100,0	£ -	£ -	-£ 100,0
	GENERAL FUND					£ -	-£100,0	£572,0	£ -	£ 472,0

	Benefit	Description	Qty	Benefit Cost	Total	Timing
1	FM Savings	Estimated saving, based on limited financial data million FM budget. Comparable authorities have saving of 15 to 18% and providers claim up to 30% Assumed 15%	-	-	£495.00	April 1,
2	Revenue Savings via Business	Reduction in management, overheads and ancillary costs	18	£1.50	£ 27.00	April 1,
3	Staff Efficiencies	Reduction in requirement of property data about through centralisation of	2	£ 25.00	£ 50.00	April 1,
4	Procurement of	Professional fees associated with			£ 100.00	2011

Appendix 7

Draft Milestone Plan - PROPERTY

			Draft Milestone Plan - PROPERTY																		
	Activity	Owner	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10	Aug-10	Sep-10	Oct-10	Nov-10	Dec-10	2011	2012	
Efficiency	Blueprinting	Neil Hindhaugh & Chris Kelly	▲ CMT approval	▲ Executive sign on	▲	▲ Agree the Commercial Portfolio direction									▲	▲ Agree the outline for the year 3 plan.					
	Facilities Management	Neil Hindhaugh & Chris Kelly	▲	▲ Identification of FM requirements			▲	▲ Identify services to be provided					▲	▲ Prepare & publish OJUE document as part of benchmarking	▲	▲ Send out full tender document			▲ Consultations and in-house analysis / progress	▲	▲ Implementation of FM
	Delivering Change Through Design	Neil Hindhaugh & Chris Kelly	▲	▲ Evaluate options	▲	▲ Identify cross Directorate resource	▲	▲ Identify fully required design services required		▲	▲ Align with OJUE document for FM to benchmark		▲	▲ Prepare & publish OJUE document as part of benchmarking	▲	▲ Send out full tender documents			▲ Consultations including in-house / selection & award	▲	▲ Implementation
	Corporate Strategic Asset Management Forum	Neil Hindhaugh & Chris Kelly			▲	▲ Agree project role	▲	▲ Corporate Strategic Asset Management Forum		▲	▲ Corporate, Strategic Asset		▲	▲ Corporate, Strategic Asset Management Forum	▲	▲ Corporate, Strategic Asset Management Forum					
	Management Of Land & Property Portfolio	Neil Hindhaugh & Chris Kelly		▲	▲ Identify information & data across	▲	▲ Identify TOR for Data Capture Project		▲	▲ Identify ICT requirements to capture data					▲	▲ Business case for investment of ICT interface					
	Change Management Process	Neil Hindhaugh & NKA	▲	▲ Agree Portfolio approach and develop process implementation plan	▲	▲	▲ Change Management Forum Meeting		▲	▲ Change Management Forum Meeting				▲	▲ Change Management Forum Meeting	▲	▲ Change Management Forum Meeting				
	Enabler Commissioner Forum	Neil Hindhaugh & NKA	▲	▲ Agree Portfolio approach and develop process implementation plan	▲	▲	▲ Enabler / Commissioners Meeting		▲	▲ Enabler / Commissioners Meeting				▲	▲ Enabler / Commissioners Meeting	▲	▲ Enabler / Commissioners Meeting				
Systems	ICT Projects	Neil Hindhaugh & Chris Kelly							▲	▲ Agree & communicate ICT project requirements				▲	▲ Write tender for deliver of ICT					▲	▲ Procure interface
Miscellaneous	Financial Improvement Targets	Neil Hindhaugh & Chris Kelly	▲	▲ Agree level of Financial savings targets																	
	More for York Communication	TBC																			
		▲ Milestone Completed	▲ Milestone on Target	▲ Milestone Overdue	▲ Milestone at Risk	▲ Date TBC	▲ Milestone on hold	▲ Milestone baseline and progress													

Appendix 8: Total Facilities Management

MAINTAINING PROPERTY - Hard FM

Computerised Maintenance/Technical Management
Power Failure/Back Up
Building Management Systems
Lighting
Compliance with Legislation
Temperature Controls
Heating and Ventilation
Portable Appliances
Access Systems
Specialist Equipment/Flooring
Water Quality
Pumps
Lifecycle Maintenance Plans
UPS / Generator
Fabric
Signage and Barriers
Electrical Safety
Security Systems
Refrigeration
Air Handling
Catering Equipment and Servery's
Portable Appliances
Lifts
Glass and Glazing
Fire Prevention and Monitoring Equipment
Cooling Systems/Air Conditioning

MANAGING THE ENVIRONMENT – Soft FM

Cleaning
Carbon Footprint Monitoring
Porterage
ISO Standards
Grounds Maintenance
Disposing of Waste
Energy Management – Display
Energy Certificates
Recycling
Window Cleaning
Reception Services
Fire Alarm Test/Evacuations
Security Guarding
Audio Visual Set Up
CCTV Monitoring
Parking Management
Post and Mail Room Duties
Temperature/Bacteria Testing
Food Preparation and Service
Statutory Compliance
Space Planning
Event Management
Disaster Recovery/Hazard Awareness
Pest Control