

Strategic Property

# Strategic Asset Management Plan

2020-2025

**Bolton  
Council**

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Asset  
Management Policy  
2020-2025

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# 1.0

## Introduction

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

“Bolton Metropolitan Borough Council owns or operates over 1,722 land and building assets, with a total owned buildings value of £676 million and land ownership of circa 2,086 hectares the equivalent of 3,898 football pitches (or just over eight square miles).

A key enabler to delivering our Bolton 2030 vision and goals is how we use all our resources, and this includes our land and buildings.

To support this, the council has adopted a new Asset Management Framework which has three core sections as follows:

- 1 An Asset Management Policy  
(this first section)
- 2 An Asset Management Strategy
- 3 An Asset Management Action Plan

The new Asset Management Framework is a suite of living documents, divided into three clear parts that can be updated separately to remain relevant

1

*The Asset Management Policy establishes:*

- » What the corporate approach or attitude is to its property assets
- » What behaviours are expected
- » What principles are going to be followed

2

*The Asset Management Strategy establishes:*

- » What we think our future should look like
- » Where we want to be

3

*The Asset Management Action Plan establishes:*

- » What we need to do to deliver our strategy
- » The specific actions and focus areas

# 1.2

## Asset Management Policy

This Asset Management Policy establishes some clear principles by which we will manage our land and buildings and make strategic decisions and define longer terms action planning against our Estate.

It will remain in place for the next five years and is designed to make sure that the property asset strategy is reflected in the decisions of all parts of the organisation.

It establishes:

What the corporate approach or attitude is to its property assets

What behaviours are expected

What principles are going to be followed

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



2 To provide the right property, of good standard, in the right place, to meet current and future service needs.



3 To manage and maintain property effectively, efficiently and sustainably, whilst 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 collaborative working where it can provide benefit for service delivery, whilst securing efficiencies and value for money.



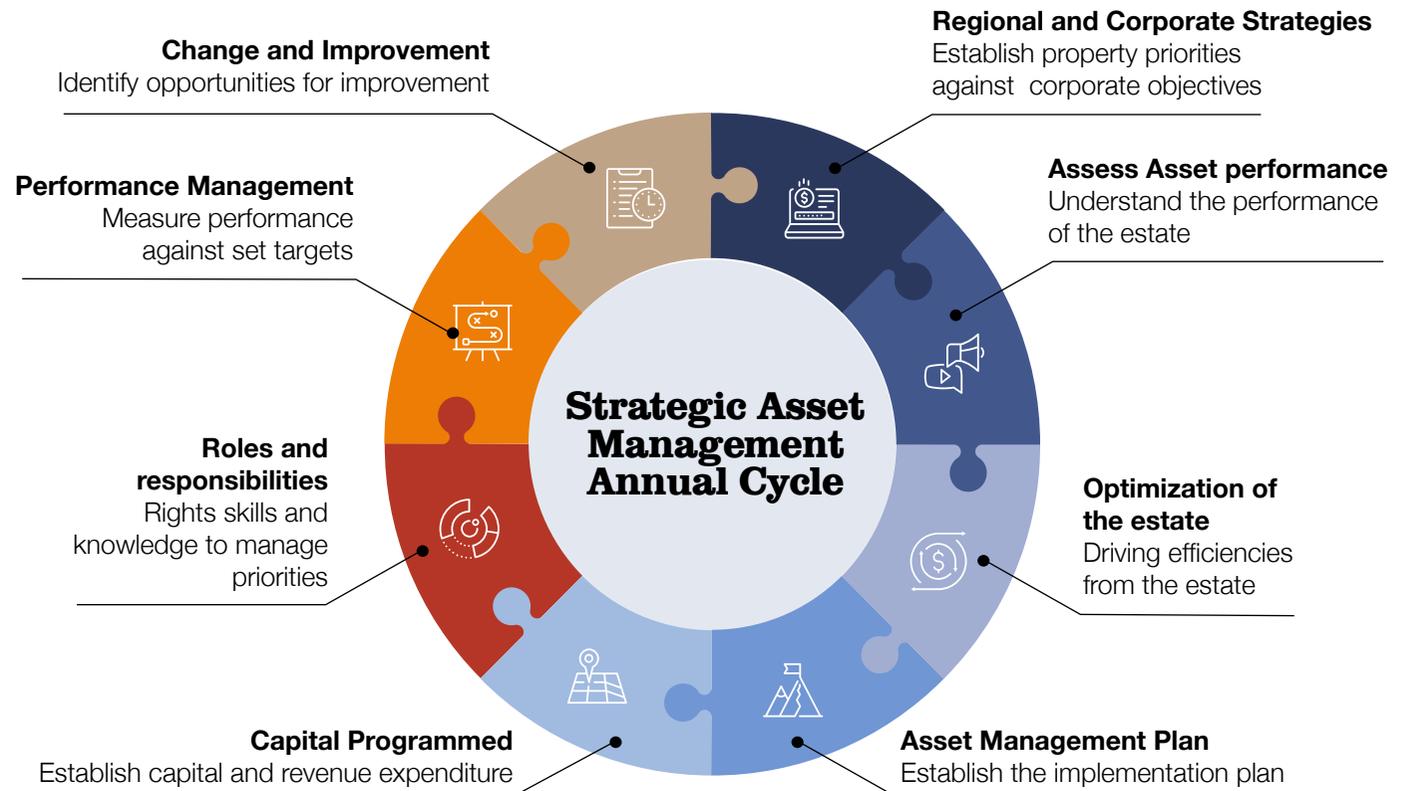
# 1.3

## Aims and approach

In producing this SAMP we will:

- Explain the framework in which the estate sits, including financial and portfolio summary
- Assess the shape and condition of the current estate
- Establish objectives for asset management
- Provide a programme of activity for the delivery of the objectives
- Set out a framework for an annual review of the 'state of the estate'

The action plans will be reviewed on an annual basis (using the process cycle below)



# 1.4

## SAMP objectives

The SAMP provides a framework within which Bolton Council can secure the operational and financial benefits of an Estate which aspires to standards of best practice.

“ It will address the need to secure the potential economic benefit within an optimised estate whilst supporting delivery of the Council’s objectives through delivery of five key areas (“the five pillars”):



### The objectives of the SAMP are to:

- Establishing a corporate framework for the management of all our property assets through the adoption of a corporate landlord model
- Highlight our corporate priorities that deliver the best outcomes
- Articulate a vision for Council land and property assets over the next five years
- Set out a strategic approach in respect of the Council’s land and property assets so the portfolio is managed as a whole rather than considering assets in isolation
- Support longer term regeneration and growth by preparing business cases for retaining, acquiring or disposing of assets ensuring best consideration is achieved and where relevant community and social value is taken into consideration.
- Develop an approach that maximises income and works across Bolton as One Public Estate for efficiencies
- Ensure that to meet services objectives and Community needs, we have the right assets in the right location, in good condition and efficiently managed

# 1.5

## Actions and behaviours

In developing our strategic approach (SAMP) to our land and buildings, this policy includes certain actions and behaviours that we need to adopt, these are specific but also compliment the overall Bolton values and behaviours.

“ These are set out under each principle, in no particular order or priority and although some may appear to be in conflict, the key challenge for the council is ensuring that we maintain a balanced approach between all of these fundamentals 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 Bolton

- We have clear corporate decision making and challenge on all property affairs
- Property budgets are managed corporately and centrally to prioritise key investment needs
- Property is integrated with other resources
- We will work to ensure property information is accurate, current and comprehensive
- We will ensure effective balance between corporate and service priorities
- Capital Projects will be managed efficiently and effectively, and prioritised to support the Strategic Themes
- Forward planning for property will be aligned to the longer term Bolton '2030 Vision'

### 2. To provide the right property, of good standard, in the right place, to meet current and future service needs

- We will work to ensure that property is suitable and sufficient for service delivery and integration of wider public services (One Public Estate)
- We will work to ensure that property is secure, safe to use and fulfils statutory and legal requirements
- We will work with our service areas to understand their longer-term requirements, in order to plan for the future
- We will work with other public services and community groups to optimise the use of assets and land where most beneficial
- We will work to ensure that equalities are considered in the development of our asset plans, fully engaging and consulting with diverse communities and partners



### 3. To manage and maintain property effectively, efficiently and sustainably, whilst 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 move towards modern ways of agile working
- We will challenge the cost of property activities to drive performance improvement
- We will optimise financial return and commercial opportunities
- We will ensure that buildings are sustainable in design, construction, operation and maintenance

### 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, increase social value and bring sustainable revenues into council
- We will manage our commercial portfolio effectively, balancing regeneration needs, job creation and income generation
- We will promote a high quality physical environment and refreshed identity to Bolton centres
- We will identify a future supply of land, suitable for housing and employment needs

### 5. To promote collaborative working where it can provide benefit for service delivery, whilst securing efficiencies and value for money

- We will work with other agencies and public services to promote and increase co-location and joint service delivery (examples include – One Public Estate OPE, Locality Asset Reviews LAR and Greater Manchester Spatial Framework GMSF)
- We will work to support the integration of health and social care
- We will support the aspirations of GMCA (Greater Manchester Combined Authority)
- We will work with private sector Consultants and Developers to ensure we have an outside in view of best practice and innovations

# Bolton Context and Corporate Strategy 2020-2025



# 2.0

## About Bolton

Bolton is a town in Greater Manchester, in the North West of England. Close to the West Pennine Moors, it is 10 miles (16 km) northwest of the city of Manchester and surrounded by several smaller towns and villages.

“Bolton is a town with a rich and proud heritage, and a bold plan for a bright and prosperous future. As we look to 2030 and beyond, the local authority and its private sector partners are drawing on the qualities which built our great town in the 19th century. Our Bolton vision will bring about an active, connected and prosperous town which benefits all our communities and citizens.”

### Economy

In 2017 it was estimated there were approximately **112,000 jobs** in Bolton, which was around **8.5%** of all jobs in the Greater Manchester area.



» Overall there are fewer people working in professional and associate professional occupations and more people working in sales and customer service occupations in Bolton compared to England and Wales.



» In 2017 almost 1 in 6 employed residents in Bolton work in the health care industry. The next biggest industry in Bolton is manufacturing – this made up around 12% of all jobs. Bolton also has a significant number of people employed in the retail industry as well as in education, as well as a larger than average number of people working in transport and storage, motor trades and property.

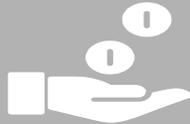


# 2.1

## Demographics

Bolton as a whole underperforms in employment, health outcomes and life expectancy when compared to the National Average. A primary Bolton Council objective is to support policy and services in reducing this inequality.

The Population is projected to exceed 300,000 by 2025. By 2037 the number of residents aged 75 and over will have increased from 21,000 to over 35,000 residents. 20.1% of Children (u16's) live in families on low income (national average 17%) and Percentage of people aged 16-64 in employment is 69.7% (national average 75.2%) (source Bolton LAR 2020)



GVA is approaching £5bn, c8% of Greater Manchester.

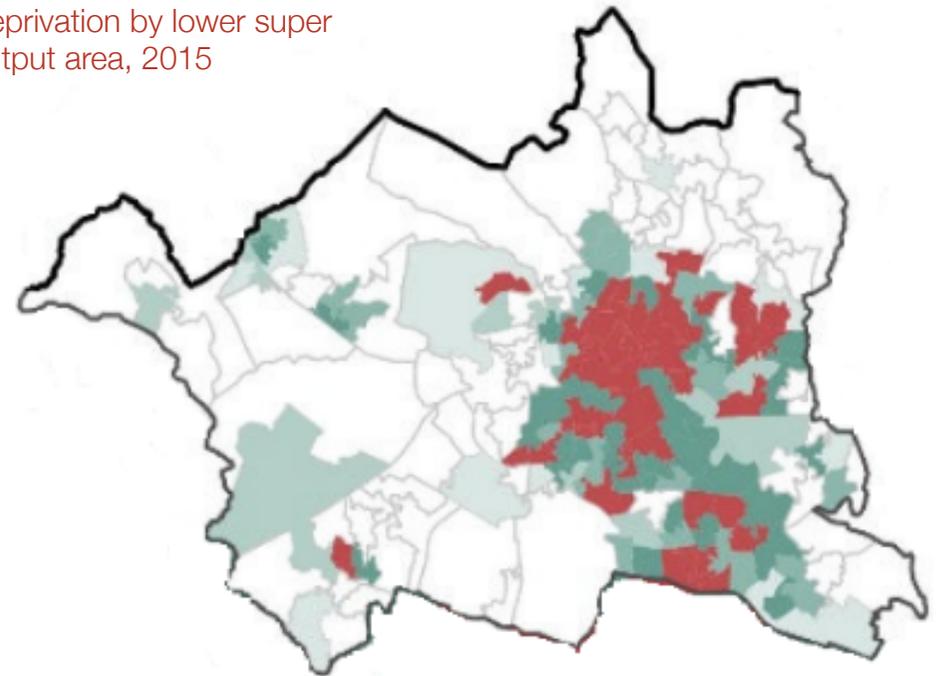
There are 20 wards in the borough, sub divided into nine localities and three Neighbourhoods.



Bolton's households are projected to increase by 10% over 25 years, from 118,500 in 2016 to 130,700 in 2041, an average gain of 487 households per year.



Deprivation by lower super output area, 2015



- Most deprived 10%
- Second most deprived decile
- Third most deprived decile
- Fourth most deprived decile
- Fifth most deprived decile
- Least deprived 50%

Source: MHCLG, English Indices of Deprivation, 2015

# 2.2

## Corporate Strategies

Chief Executives Directorate Plan — Economic Prosperity

“Bolton will be a vibrant place, built on strong cohesive communities, successful businesses, and healthy residents. It will be a welcoming place where people choose to study, work and put down roots.

Bolton Council process to deliver continuous improvement means a Bolton Vision 2030 refresh has been undertaken – it aims to revisit the governance and strategic direction to deliver tangible changes for the people and place that is Bolton. Creation of seven task and finish groups oversee delivering an important change programme. The work will compliment and reflect the council's seven priorities and vice versa.

1. Big Up Bolton
2. Strong and Engaged Communities
3. Economic Prosperity
4. Skills and Aspirations
5. Social Value
6. Neighbourhood Models

**The programme will ideally reflect on both plans of impact and change in Bolton through these outcomes:**

- » Giving the children the best start in life
- » Improving health and wellbeing of residents
- » Supporting older people to stay healthier
- » Attracting business and investment
- » Protecting and improving the environment
- » Develop stronger, cohesive, confident communities
- » People feel safe, welcome and connected

# 2.3

## People Services Strategic Plan

Bolton Vision 2030 recognises in order to realise a powerful vision a new strategy needed to be set and developed over a 10 to 15-year period.



### The overall Vision for 2030:

Bolton will be a vibrant place built on strong communities, successful businesses and healthy, engaged residents. It will be a welcoming place where people choose to study, work, invest and put down roots.

#### Start Well

**Priority 1:** The best start in life for every child in Bolton

**Priority 2:** Keep children learning successfully

**Priority 3:** Keep children safe and help them to achieve permanence

#### Live Well

**Priority 1:** All children will achieve their potential

**Priority 2:** People with care and support needs will stay well for longer

**Priority 3:** Enable people with caring responsibilities to live well

#### Age Well

**Priority 1:** People in Bolton live longer, healthier lives

**Priority 2:** People will remain independent for as long as possible

**Priority 3:** Bolton will have high quality long-term services



# 2.4

## Place Directorate Plan

At a strategic level, the Directorate supports the delivery of:

- Greater Manchester Strategy
- Bolton 2030 Vision
- The delivery of the Corporate Plan
- Be Safe Partnership
- Housing Strategy
- The Local Plan

The Directorate's contribution to the Corporate Performance Dashboard is reported using the Bolton 2030 Vision Place Priorities and shows the alignment to the Greater Manchester Strategy and Place Priorities.

Place priorities within the Bolton 2030 Vision are:

- 1.** Creating jobs and attracting new investment
- 2.** Create a workforce responsive to demand
- 3.** Provide quality housing
- 4.** Create a strong and distinctive place
- 5.** Places and neighbourhoods which people are proud of
- 6.** Create a safe and welcoming Bolton
- 7.** Create a well connected Bolton
- 8.** Provide joined up services



# 2.5

## Place priorities within the Council Corporate Plan

Lead on the development of a cleaner and greener borough

Deliver on key regeneration areas across the borough, including new housing delivery

Lead a prioritised approach to asset management across the organisation

Four key priority themes to deliver day-day functions aligned with Bolton's 2030 visions and the Councils Corporate Plan for 2019/21:



### ***Business Resilience***

Develop business infrastructure to support the delivery of quality front-line services



### ***Connected Neighbourhoods***

Well-connected places to live and through building strong communities, where people feel safe and engaged



### ***Sustainable Assets***

Protect physical asset and environment, provide a safe and borough with places to live, work, study, visit and socialise



### ***Growth and Innovation***

Grow the local economy and support employment and skills, maximising opportunities to safeguard our long-term viability

Asset  
Management  
Strategy  
2020-2025

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# 3.0

## Asset Management Strategy

“Strategic Property Asset Management is the process which aligns business and property asset strategies, ensuring the optimisation of an organisation’s property assets in a way which best supports its key business goals and objectives”

*RICS Public Sector Asset Management Guidelines 2nd Edition*



This strategy determines the high level strategic framework for the effective management of our land and property portfolio. It will guide decisions regarding the use of land and property assets ensuring that they support the optimisation of both financial and social value to meet the corporate objective of developing sustainable and resilient communities.

In all cases, assets should be aligned to delivering the Councils corporate priorities and must be maximised to ensure effective service, community or financial benefit. Financial conditions continue to be challenging, whilst customer expectations and demand is increasing.

In property terms, introducing the corporate landlord model, reducing accommodation costs, optimising their benefit for local communities and maximising revenue and capital generation remain the core principles for this strategy.

**Our strategy centres around the delivery of our five pillars:**



Corporate Landlord



Estate Optimisation



Economic Growth and Regeneration



Partnerships



Housing

In order to develop the strategic asset management plan we have reviewed the corporate strategy and ensure that the SAMP priorities are aligned to the corporate priorities. A high level assessment of asset performance has been undertaken and the outcomes have assisted in developing the approach to ongoing estate reviews which will inform the SAMP.

The asset management strategy will be reviewed annually and evolve to ensure its relevance to the changing landscape within which Bolton operates. This is particularly important where there is evidence of underperforming assets or opportunities to drive further value from the estate.

### **Aims and objectives**

- » Utilise property assets to support local communities and income generation.
- » Estate optimisation to minimise operating costs
- » Compliance with legislative and statutory duties to ensure that our portfolio is safe, accessible and fit for purpose.
- » Adopt whole life costing principles
- » Capital Investment strategy
- » Financial drivers – income, reduction in running costs etc

# 3.1

## Strategic Anchors (The Five Pillars)

The Asset Management Strategy provides an overview of our land and property estate, together with our five pillar approach and focus areas for managing and developing the estate over the next five years.

Underpinned by our commitment to the development of a socially responsible and sustainable estate. These **key objectives** will have the biggest contribution in taking us to where we want to be.



### **Corporate Landlord**

Embed a culture through a Corporate landlord model that recognises that property assets are a key corporate resource, where decisions need to be made that are linked to corporate and service objectives that delivers good financial and service outcomes.



### **Estate Optimisation**

Maintain and develop the management of our property assets to continually improve how our assets work for us, optimise returns and minimise the costs of operation. Ensure ownership and occupation of assets is robustly challenged.



### **Economic Growth and Regeneration**

Support economic growth and regeneration across Bolton. Revitalise town centres through repurposing with a modern offering which fosters greater social interaction, community spirit, local identity and heritage.



### **Partnerships**

Develop Innovative One Public Estate and Private partnerships to maximise the benefit of the corporate asset base. Co-location with other partners. Develop integrated service delivery partnership combining public and private expertise and resources.



### **Housing**

Supporting the locality through the Housing delivery plan providing the right types of houses in the right locations. Aligning property with housing strategy and planning policy. Identify and develop land for annual housing unit numbers.

*Socially responsible, sustainable and net-zero carbon estate*

# 3.2

## Overview of Corporate Property

Bolton's estate comprises of 1,722 Property and Land holdings, with a combined footprint of 2,086 hectares, of which 569 are Buildings Assets only.

“ The council is implementing a corporate landlord model (with asset resources being “allocated” and managed centrally).

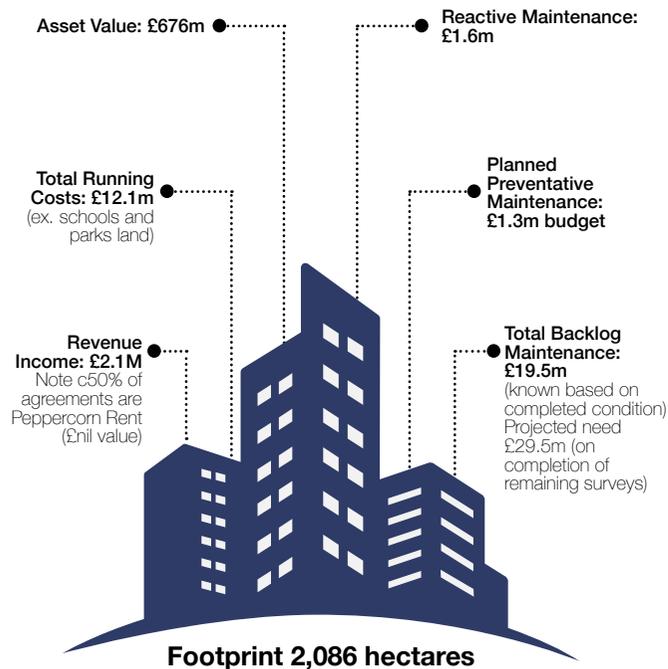
Property holdings range from administrative office buildings, operational buildings situated in the community (such as schools and libraries) and more complex operational sites (such as depots). They are held on a mixture of tenures, freehold and leasehold.

The Council is a Local Education Authority and runs community schools where repair and maintenance are devolved to the schools themselves.

The operational portfolio comprises all assets which are used to deliver services and administrate.

The Council's property function sits within the Place Department. The council asset base has an estimated asset value for its accounting purposes of £676m overall, annual revenue spend of those properties in the corporate landlord including rates, rent, maintenance, utilities is in excess of £12.1 million. Alongside the management of the Council's property portfolio the function will be responsible for the delivery of the council's capital investment programme.

Strategic Corporate Asset Management will be retained in house which establishes and defines the Council's property need in respect of assets and their management. It commissions its management requirement for estate and facilities management, repairs, maintenance and statutory compliance assurance, to our strategic property partner Robertson Group and our construction and capital investment partner CSF (Clear Sustainable Futures)



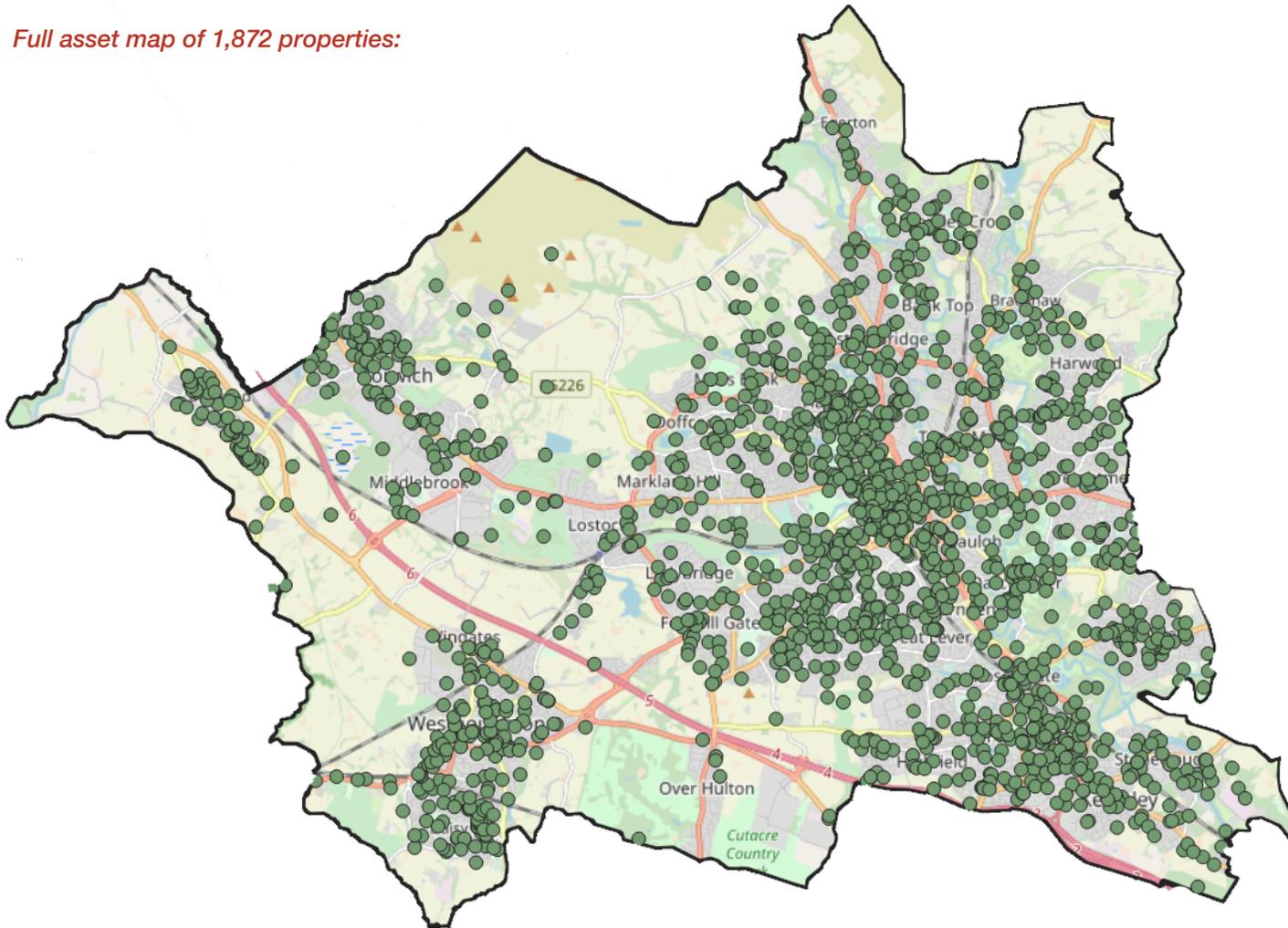
### The key objectives of this portfolio are:

- » Provide adequate and appropriate space for the service (Including maintenance and running)
- » Optimise occupancy
- » Ensure statutory compliance
- » Minimise expenditure

# 3.3

## Summary of the current portfolio

Full asset map of 1,872 properties:



### Estate

Footprint 2086 Hectares (Ha)  
Land only 1293 Ha

### Land only

Land held for Sale 5.9Ha  
Land held for investment 368.6Ha  
Land Surplus 12 Ha

### Ownership

Owned 80%  
Leased 11%  
Other (managed etc) 9%

### Tenure

Freehold 76%  
Leasehold 8%  
Other (managed, leased etc) 16%

# 3.4

## Our Assets by type



256 Investment Properties



126 Educational Assets



8  
Community Assets



179 Operational Assets



# 3.5

## Assessing a sample of the estate (116 surveyed assets)

“ We have reviewed a sample of 116 surveyed assets. The intention is to replicate this process across the other sub-portfolios and categories once data is collated.

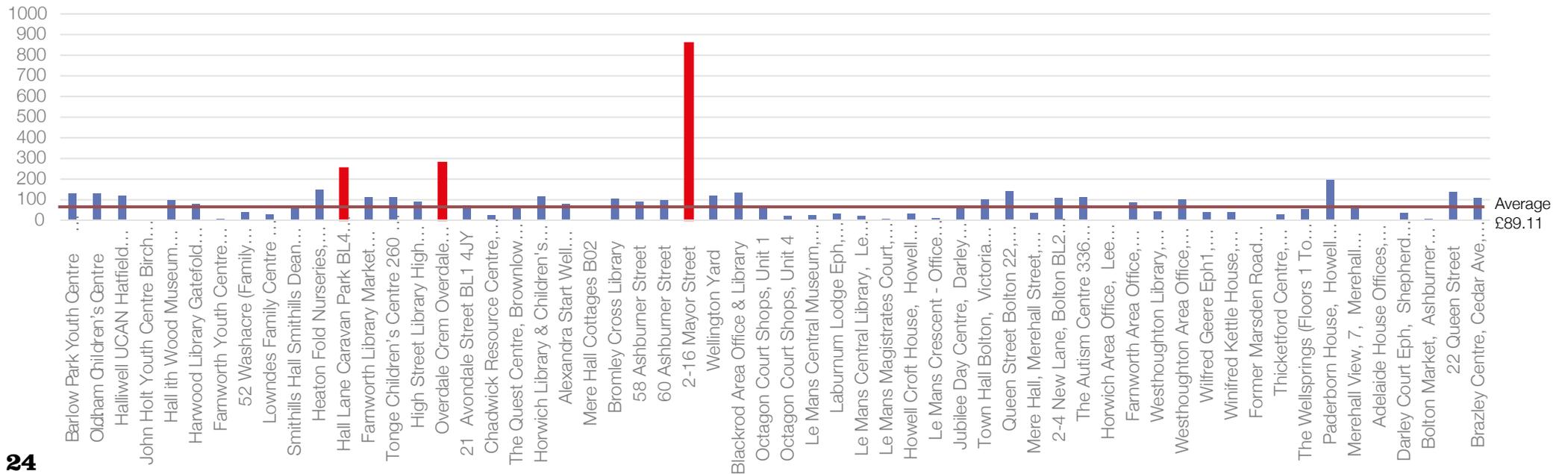
Of the 116 surveyed assets, 58 had both a GIA and running cost values (as seen in figure 1). Where buildings didn't have both values is due to costs being grouped into one asset or the building is currently, vacant/unoccupied.

Overdale Crematorium and Hall Lane Caravan Park. Based on the data analysis these are the first two buildings that will be assessed for asset optimisation with 2-16 Mayor Street as the priority based on the high running cost.

Many of the running cost per square meter ranges from £3.15-£858.28. From an occupancy perspective two buildings are outliers demonstrating significant running costs. These are 2-16 Mayor Street and

The remaining 58 anomaly assets were mainly park buildings or assets where costs had been grouped into one of the assets above, therefore had no to minimum costs associated with them.

**Figure 1- Running Cost per m<sup>2</sup>**





### Immediate H&S Maintenance Totalling : £238,782

Of the 116 surveyed assets 41 require immediate H&S work. Five of these assets, Wellington Yard, Moss Park Play Centre, Moss Bank Park Depot and Alexandra Start Well Children’s Centre, need a substantial amount of work completing (highlighted in figure 1).

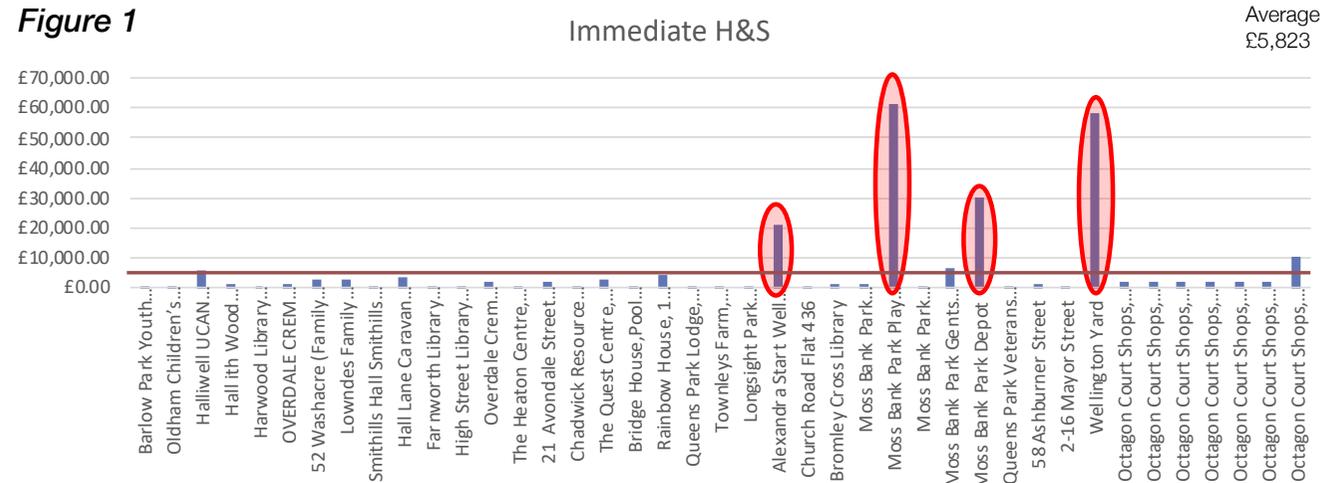
Due to the nature of the faults all of these assets require immediate attention as soon as possible, to avoid any health and safety issues and make sure the site is being used utilised.

### Year One Planned Maintenance Totalling: £9,977,037

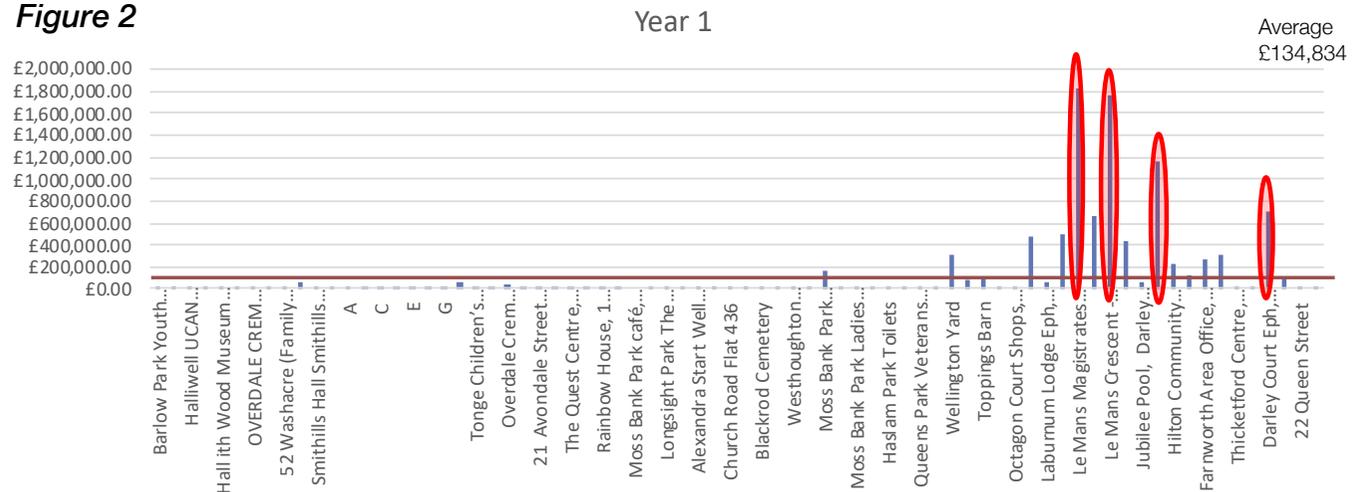
74 of the 116 surveyed assets require works carrying out within one year of the backlog maintenance five year plan. The costs range from £85 -£1.8m, with an average cost of £134,834.

The top four assets that require a significant of funding are Le Mans Magistrates Court, Le Mans Crescent Office Accommodation, Bolton Town Hall and Darley Court Eph.

**Figure 1**



**Figure 2**





### Two-Three Year Planned Maintenance Totalling : £4,277,189

77 of these assets require attention in years 2-3, averaging £55,547.91. The costs per asset range from £25- £2.3m.

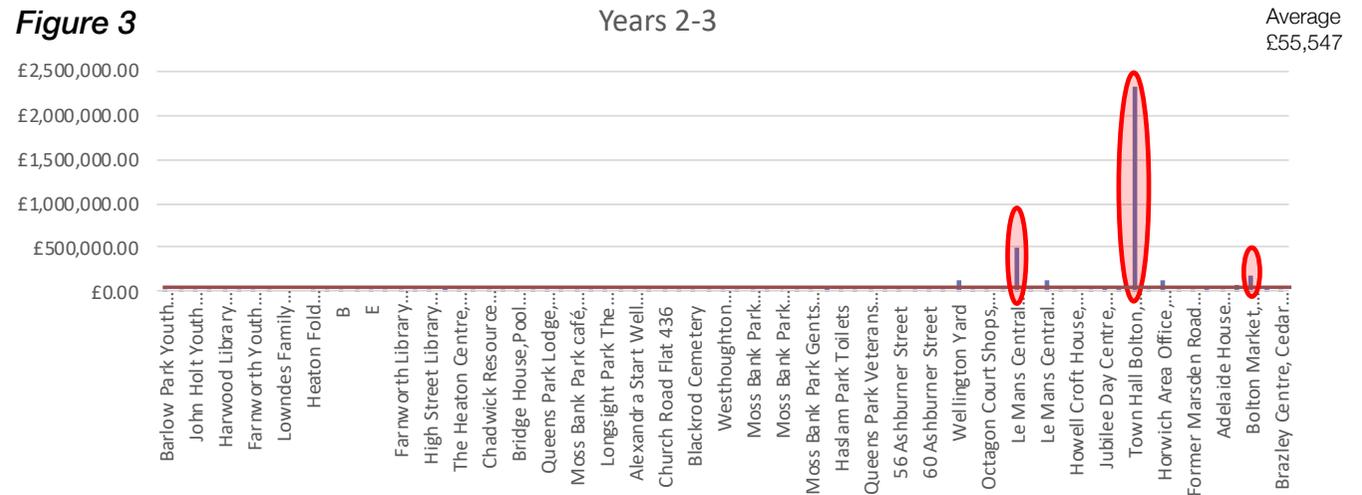
Figure 3 highlights three of the assets require a substantial amount of funding, Bolton Town Hall, Le Mans Central Museum and Bolton Market.

### Four-Five Year Planned Maintenance Totalling : £2,053,250

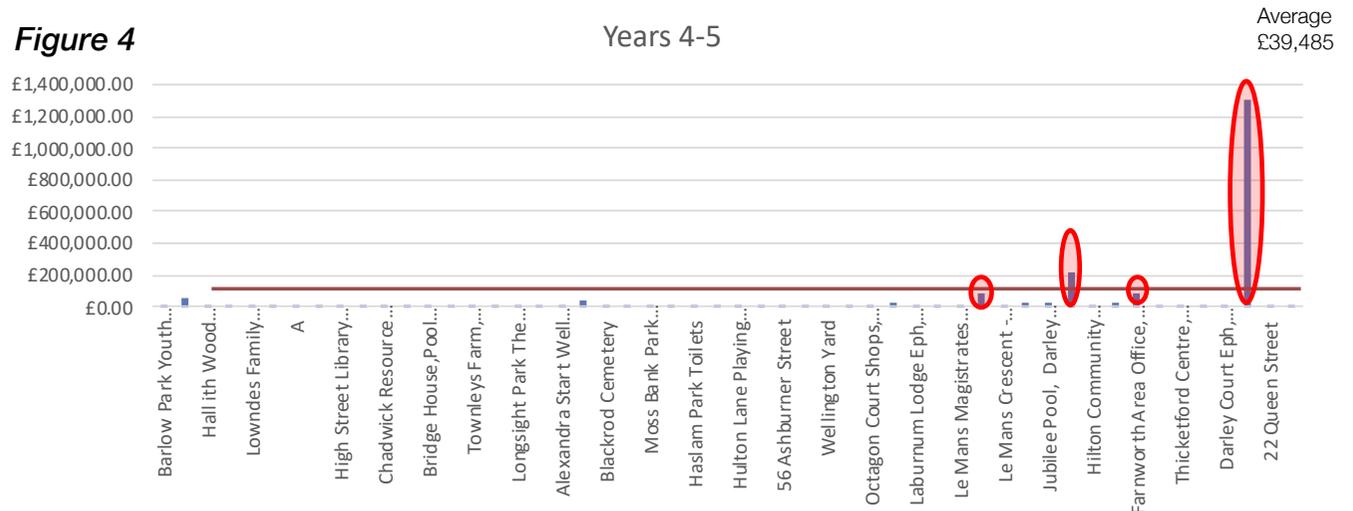
Its estimated 52 of the 116 assets require maintenance in years 4-5, averaging £39,485.58. The costs per asset range from £35-£1.3m.

Figure 4 emphasises there are four assets that require a significant amount of funding, Bolton Market, Bolton Town Hall, Farnworth Area Office and Howell Croft House.

**Figure 3**



**Figure 4**





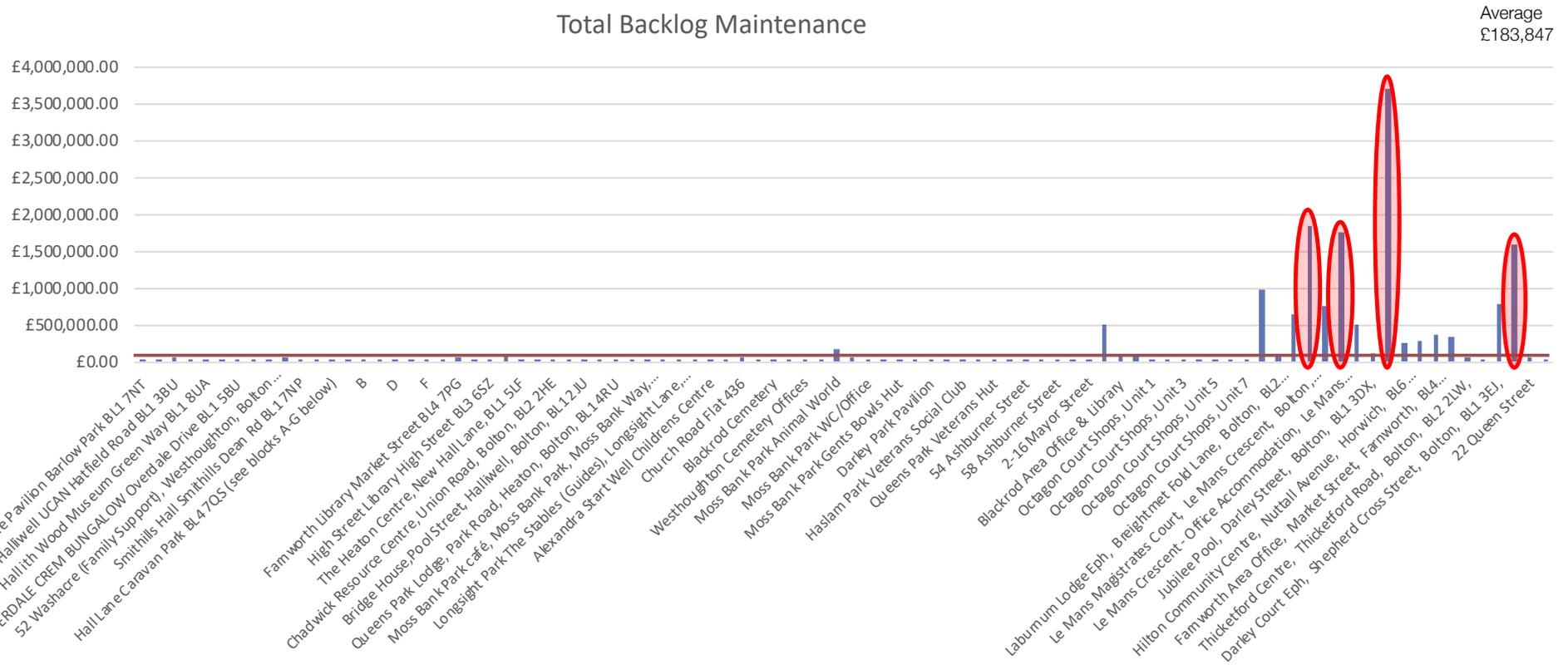
**Total Planned Maintenance  
Totalling : £16,546,258.00\*\***

The amount of capital needed to fund the total estimated backlog maintenance over the next five years is 183,849 on average, per 90 of the surveyed assets that included these costs.

Figure 5 highlights there are four assets that over the next five years will require the largest amount of capital:

- » Bolton Town Hall: **£3,701,750**
- » Le Mans Magistrates: **£1,840,800**
- » Le Mans Crescent (office): **£1,769,800**
- » Bolton Market: **£1,591,100**

**Figure 5**



# 3.6

## Asset Challenge

The Asset Challenge is a process to continually review our Asset portfolio on a continuous rolling programme, ensuring that only those Assets needed or performing to acceptable levels are retained.

“ The ultimate aims of Asset Challenge is to reduce costs, identify assets to be retained for use and/or invested in and those that can be disposed of.

Each asset will be assessed periodically using the Asset Challenge steps and outcomes recorded within the Asset optimisation section of the SAMP framework.

<b>Strategic Purpose</b>	<b>Opportunities and Risks</b>	<b>Performance Appraisal</b>	<b>Option Appraisal</b>	<b>Pre-Implementation Consultation</b>	<b>Outcome</b>
<ul style="list-style-type: none"><li>» Why do we have the asset?</li><li>» What is its strategic purpose?</li><li>» Who is accountable for performance of it?</li><li>» What do we expect of it?</li><li>» Is this financial, non-financial or both?</li><li>» How do we measure its performance against purpose?</li></ul>	<ul style="list-style-type: none"><li>» Are there any opportunities that could be developed?</li><li>» Are there any blockages to exploiting these opportunities?</li><li>» Any there any risks to overcome?</li></ul>	<ul style="list-style-type: none"><li>» What is the financial performance being delivered?</li><li>» Can non-financial benefits be quantified?</li><li>» What are the management costs?</li><li>» Are there any invisible costs?</li></ul>	<ul style="list-style-type: none"><li>» Balance of performance opportunities and risks?</li><li>» What options are available?</li><li>» What are the relative costs and benefits of these options?</li><li>» Do any options present increased risks?</li></ul>	<ul style="list-style-type: none"><li>» Internal stakeholders</li><li>» External stakeholders and partners</li></ul>	<ul style="list-style-type: none"><li>» Retained</li><li>» Repurposed/Recycled</li><li>» Disposed (Asset Transfer or Open Market)</li></ul>

# 3.7

## Corporate Landlord Model

The Corporate landlord model is a more effective basis for developing and managing the council estate.

Under this model, the whole council estate will be managed in one place, rather than services across the organisation managing assets and buildings in different ways. This will enable greater efficiency in terms of running costs across the estate, the potential for increasing income and will also identify opportunities for co-location of services.

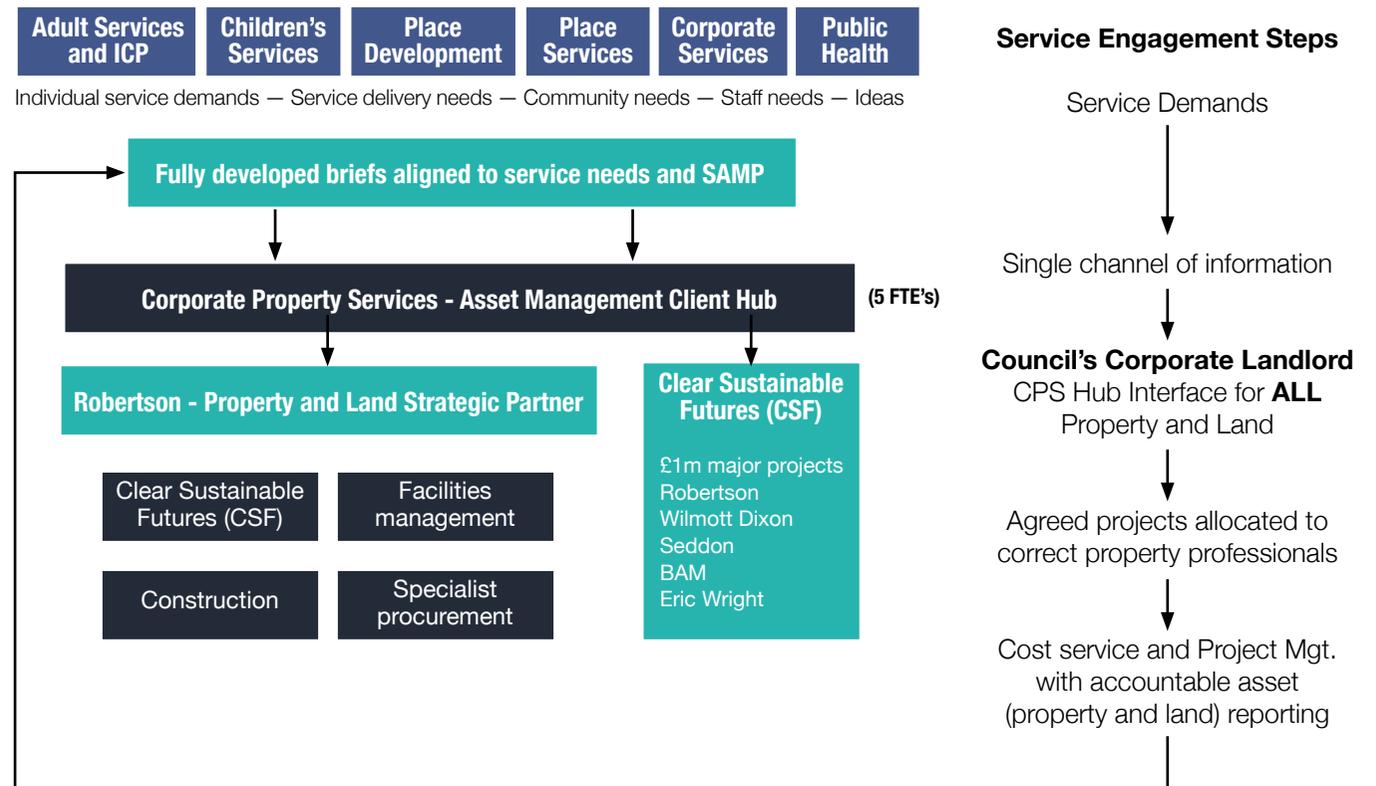
The Corporate Landlord model centralises all estate related budgets, decision making and activities within a central team – the Corporate Landlord. Service departments become tenants of the Corporate Landlord.

**In Bolton the Corporate Landlord is responsible for the following activities:**

- >> Design and Project Management
- >> Statutory Compliance of Buildings
- >> Facilities Management
- >> Estates and valuation services
- >> Energy Management
- >> Strategic Asset Management Planning and Regeneration
- >> Management of the Councils Investment Property

### Corporate Landlord Operating Model

Collective service demands aligned to corporate vision



# 3.8

## Estate Optimisation Approach

The Asset Management plan must consider the potential impact on profitability, investment return and staff, as well as the internal structural and managerial implications.

“ For the Corporate Property functions to perform a leadership role in the organisational transformation agenda and secure a significant release of savings, we will develop a mature understanding of our property data and opportunities to optimise the estate.

To act as a mature strategic property function we will adopt a robust estate optimisation process; first at a high level, then by drilling-down and assessing the opportunities in the assets.

Furthermore, the opportunities will be developed with varying degrees of change that can be adapted to suit Bolton's needs. Estate optimisation is not just about cutting costs, but is about bringing material advantages to our residents, and ultimately enhancing the delivery of the corporate objectives and strategy.

The process of estate optimisation aims to identify and prioritise those sub-portfolios that have the greatest

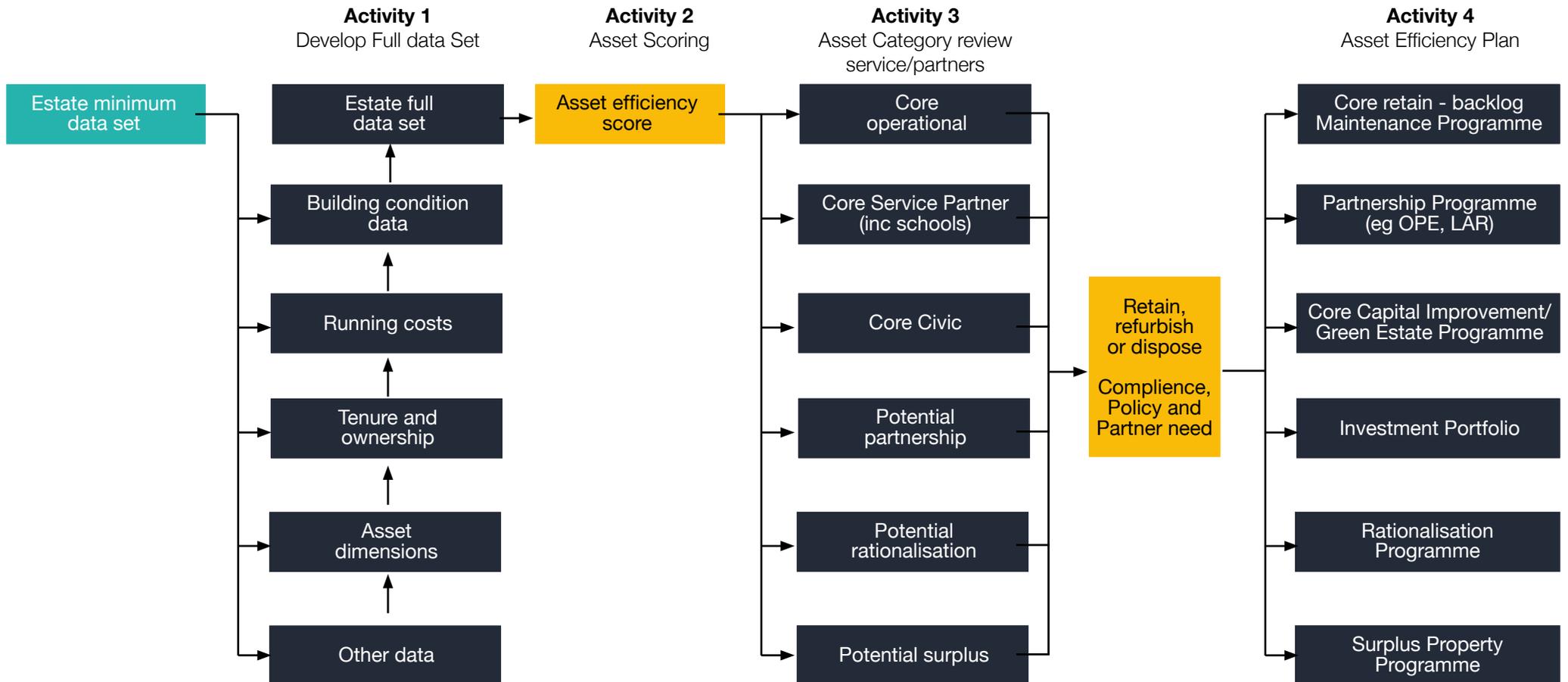
potential to release savings. Core data for each building within the Bolton's portfolio including running costs, value, condition and backlog maintenance, suitability assessments and future need ratings will be reviewed. In light of the incomplete and highly fragmented nature of property data we will take a pragmatic view to identify and plug any gaps in data. Using this process, those portfolios with high revenue spend and/or those portfolios subject to significant business change can be identified and subjected to a more detailed analysis and opportunity assessment. Following acceptance of the outline business case, more detailed work can be completed and a roadmap to releasing savings designed.

***The process to undertake the estate optimisation as outlined in the diagram overleaf.  
The outcome of this review will include:***

- » Financial analysis of the estate
- » Potential revenue impact and capital generation opportunities
- » Ranked by the potential impact (low/medium/high) and ease of implementation (quick/medium/long term)
- » Quick-wins which would help release existing liabilities
- » Longer term initiatives which may substantially change the way the estate is managed
- » Recommendations and next steps for how the opportunities could be delivered



### Estate Optimisation Model



# 3.9

## Economic Growth and Regeneration

“ The SAMP will support the Local Authority and wider business community across Bolton by ensuring that Economic Development and Regeneration are embedded elements with the SAMP Objectives, through:

- » Support long-term regeneration and growth of the borough through strategic approach to development and management of Council's assets
- » Ensure that wider regeneration and community benefits are derived from acquiring, developing and divesting assets
- » Provide a framework and strategies for the development of assets for housing, transport, and parks
- » Achieve wider regeneration benefits by sharing asset through one public estate initiative
- » Contribute to the delivery sustainable housing growth by using Council's assets to control or shape developments with other sectors
- » Support infrastructure and land assembly for regeneration projects
- » Promote development sites for future growth
- » Share the benefits of ownership council's assets through joint-ventures
- » Support the delivery of new developments, such as parks, libraries, and health centres

### Priority Projects

#### ***Victoria Square / Crompton Place***

Bolton Regeneration Limited have proposed to demolish the existing shopping centre and create a new regional destination attraction comprising retail, food and beverage, residential accommodation, a hotel, grade A office space, basement parking and significant improvements to public realm. This will include the re-instatement of a direct access from Victoria Square to Bradshawgate.

#### ***Trinity Gateway***

Beechlane (Investments) Limited (“Beechlane”) have proposed a development that will comprise of a 20 storey residential towers of 144 apartments, 30,000 sq.ft. of grade A office space and a 505 space multi storey car park which will serve the development and the town centre in general.

#### ***Le Mans Hotel***

Beechlane have proposed to redevelop all that part of the crescent that is not occupied by the library and museums service to an 87 bedroomed four star hotel with 17 serviced apartments and a health and wellness spa.

### ***Church Wharf***

Muse Developments Limited have proposed a riverside development comprising a mix of 352 homes, an 80 bedroomed hotel and 130,000 sq. ft. of offices and leisure.

### ***Blackhorse Street “Digital City”***

This is the sixth intervention area at the masterplan stage. It will provide a platform of next generation of digital connectivity need by businesses, tech start-ups, SME's, household names in the borough and beyond. It will build strong connections with universities, colleges and industry by developing cutting edge of digital technology, skills, and expertise needed in the 21st century by businesses to grow and succeed.

### ***District Centres***

The approved plan for Farnworth focuses on the redevelopment of the Farnworth market precinct and former Saddle pub site for a mixed use development including residential, commercial and community facilities. Emerging proposals for Horwich, Westhoughton and Little Lever focus on the redevelopment of a number of sites for a mix of uses also. The creation of masterplans and strategies for the four District Centres is key to enhance the economic prospects for each area by providing a clear strategy for growth, helping to future proof the towns by building on their existing qualities and assets and promoting new activities, so that their full potential as thriving towns can be realised.



# 3.10

## Partnerships – 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.

### **The Strategic objectives of the One Public Estate programme are to:**

- » Support service integration, joint working and/or co-location
- » Rationalising public assets
- » Reducing revenue costs associated with asset base to make it cost effective for the public sector
- » Release of redundant public assets for future use and investment
- » Options for the delivery of new housing, from released assets
- » Impact of future housing on service need and subsequent asset need

### **And, includes existing and developing partnerships with the likes of:**

- » Bolton Clinical Commissioning Group (CCG)
- » Bolton NHS Foundation Trust
- » IFM Bolton
- » Greater Manchester Health & Social Care partnership (GMHSC)
- » Greater Manchester Combined Authority (GMCA)
- » Greater Manchester Mental Health (GMMH)
- » NHS Property Services (NHSPS)
- » North West Ambulance Service (NWAS)
- » Bolton Community and Voluntary Service
- » Department For Education (DFE)
- » Housing Providers
- » Bolton Community Homes (BCH)
- » Bolton University
- » Bolton College
- » Greater Manchester Fire Rescue Service
- » Bolton Chamber of Commerce (and GM Chamber)

\*\* A number of key Private partnerships also exist and our critical to our delivery \*\*

There are many more opportunities across the Borough and wider Localities, to explore 'Campus' types arrangements, shared buildings and community/public service points – taking a wider public sector planning approach and encompassing the needs of our communities.

We will work with Strategic Partners, from both the public and private sector to develop innovative estates initiatives. Key to this will be our continued presence as lead organisation for the Bolton Strategic Estates group which coordinated property and asset programmes across public sector partners, in conjunction with and under the wider governance of the, GMCA Strategic Estates Group.



The strategic One Public Estate and Local Asset Review's of public sector estates have sought to maximise the efficiency of the wider public sector corporate asset base to provide an integrated facilities with improved service delivery for users, focused on:

- » Place based co-ordination to build and develop integrated services, retail, culture and leisure within neighbourhoods and town centres
- » Co-location with other partners
- » Integrated service delivery partnership combining public and private expertise and resources
- » Provide assets that are easily accessible to communities

### *Indicative Local Authority services and Health Hub Model across Bolton*



# 3.11

## Housing Delivery

Within the borough; there are local housing markets of distinct character:

- High quality residential areas to the north south and west (to the north: Turton (i.e. Egerton, Toppings) Bradshaw and Harwood, to the south Over Hulton; to the west: Lostock)
- Horwich and Blackrod to the west
- Semi-rural towns and villages to the south of the M61; (Westhoughton Chew Moor)
- The Lever's and Farnworth to the south east
- Bolton town centre broadly within the A58 ring road

The Bolton Housing Delivery Plan identifies the following key interventions for achieving housing targets:

- Homes England funding
- Review of Section 106 agreements
- Design advice and construction risk assistance
- Custom build service
- Developer guarantee 2 (off-plan sales)
- Bolton shared ownership
- Sites in low-value areas
- Increase construction capacity and reduce cost
- Community-led development

The SAMP will seek to support Housing Delivery (including Affordable housing):

- Establish Council surplus land for housing programme
- Support Bolton Housing Delivery Plan
- Identify and provide land to support housing delivery
- 726p.a. units (minimum 25% affordable)
- Support Bolton community homes delivery plans
- Secure Homes England funding for sites
- HIVE homes delivery (Brightmet)
- Identify sites suitable for supported living and integrated care facilities to support the aging population
- Contribute to the delivery sustainable housing growth by using Council's assets to control or shape developments with other sectors
- Opportunities on Council owned land for annual housing unit numbers and build upon our innovative public and private sector partnerships to maximise the benefit of the corporate asset base
- While releasing public sector land to support housing to provide assets that are easily accessible to communities and to encourage a safe and connected borough with places to live, work, study, visit and socialise
- The SAMP will under pin our strategy to acquire strategic sites to provide affordable housing in areas of economic regeneration
- Seek to deliver sustainable MMC (modern methods construction) projects in line with reducing carbon footprint and utilising more brownfield sites

# Asset Management Action Plan 2020-2025

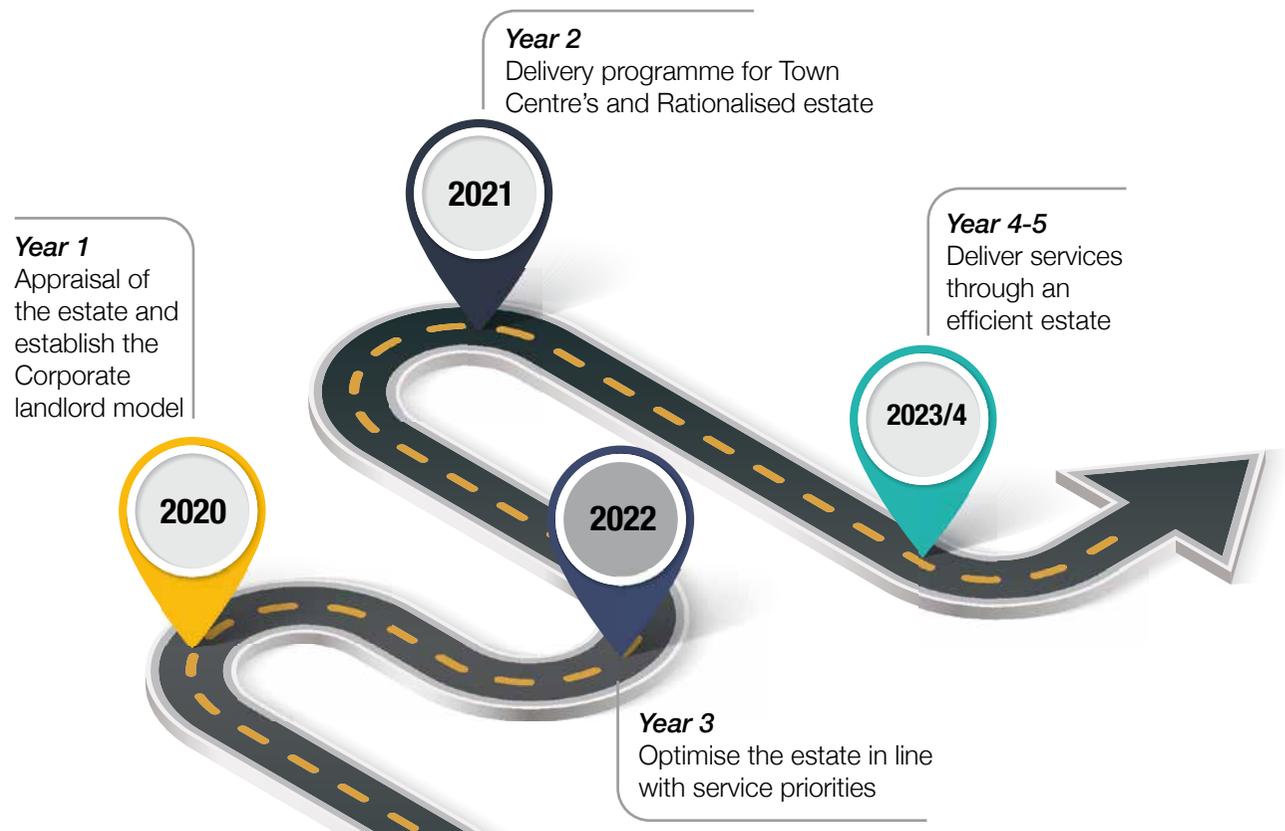


# 4.0

## SAMP Roadmap

To keep the asset management strategy relevant and aligned to changing corporate priorities, it will be refreshed on an annual basis. Each of the five pillars is supported by an Asset Management Action Plan with detailed objectives and actions.

“ Performance measures will be developed against each pillar.



# 4.1

## Five Pillars Headline Plan

### SAMP

### Asset Management Plan

#### Year 1

#### Year 2-5



#### *Corporate Landlord*

- » Corporate landlord model across the organisation
- » Establish client services managers with service area
- » Expand Backlog Maintenance Programme

- » Estate optimisation development with service areas
- » Establish core corporate programmes of work from estate optimisation
- » Develop corporate land metrics and flexible working policy



#### *Estate Optimisation*

- » Complete asset data refresh
- » Service level estate optimisation programmes
- » Occupation and use of assets are optimised

- » Review and action plan for non income generating, non operational assets
- » Introduce annual service asset planning discipline
- » Introduce measures to drive A low carbon public estate



#### *Economic Growth & Regeneration*

- » District Centres
- » Trinity Gateway
- » Le Mans Hotel

- » Church Wharf/Blackhorse Street
- » Victoria Square/Crompton Place
- » Support strategic objectives for digital strategy, heat networks and health city



#### *Partnerships*

- » Governance for SEG partners to progress projects
- » Embed OPE7 / LAR in town centre masterplans
- » Pupil pressures land availability programme

- » Create SEG Programme Management Office
- » PMO link to wider corporate landlord programmes
- » Delivery of projects which enable service transformation



#### *Housing*

- » Council Surplus land for housing programme
- » Identify sites suitable for supported living
- » Support MMC delivery

- » Assessment of sites identified for release through Estates Efficiency Programmes
- » Surplus land and site assessment across estate
- » Assessment to establish cost benefit of readying site for land sale v site valuation

# 4.2

## Corporate Landlord



### Corporate Landlord

#### ← SAMP Action Plan →

#### Corporate Priorities

*Place Priorities within the council's Corporate Plan:*

- Lead a prioritised approach to asset management across the organisation
- Deliver on key regeneration areas across the borough, including new housing delivery
- Lead on the development of a cleaner and greener borough

#### SAMP Objectives

Implementing a corporate landlord model to provide a streamlined and integrated approach to the management of the council's assets.

Embed a culture that recognises that property assets are a key corporate resource, where decisions need to be made that are linked to corporate and service objectives that delivers good financial and service outcomes for people of Bolton.

Ensure property assets support delivery of council strategic objectives, corporate plans, 2030 Vision and medium-term financial plan.

Provide clear direction for the management of the portfolio.

*Optimise efficient use of resource:*

- Using data from service users, building surveys and service managers to inform building refurbishment and maintenance programmes
- Integrating the digital strategy with service delivery

#### Year 1 Priority

Embedding the Model of Corporate Landlord across the Organisation.

Establish terms of reference for client services managers with each service area.

*Roll out of key Corporate Landlord metrics around:*

- Centralised budgets
- Centralised model
- Effective governance
- Assets - full cost of estates
- Property investment strategy
- Property framework/guidance

*Expand backlog maintenance programme:*

- Running costs are minimised through programmes of condition, health and safety and suitability.
- Stock conditions survey (schools)
- Compliance work based on surveys
- Appraise backlog maintenance pressures against capital investment priorities

#### Year 2-5 Road Map

Estate optimisation development within key service teams to align with service objective, locations and base requirements.

Development of flexible working policy and implementation.

*Establish core corporate programmes of work, post Estate Optimisation for:*

- Capital Programme
- Disposal Programme
- Partnership (SEG) programme
- Investment portfolio
- Asset Rationalisation programme

# 4.3

## Estate Optimisation



### Estate Optimisation

#### SAMP Action Plan

##### Corporate Priorities

###### Chief Executives Directorate Plan

- Economic prosperity
- Attracting businesses and investment
- Protecting and improving our environment

###### People Services Strategic Plan

- The best start in life for every child
- All children will achieve their potential

###### Place Directorate Plan

- Creating jobs and attracting new investment
- Create a workforce responsive to demand
- Grow the local economy and support employment and skills, maximising opportunities to safeguard our long-term viability
- Develop business infrastructure to support the delivery of quality front-line services

##### SAMP Objectives

The SAMP will provide a framework to optimise the Bolton Council Estate to generate operating savings, ensure assets are fit for purpose, meet service operating and user needs, incorporate technological advances and minimise whole life building costs, through:

- Rationalising our operational estate. Surplus disposed of through lettings or sales. Where feasible transfer to investment portfolio
- Reducing energy costs by utilising loan schemes such as the re-fit programme, applying infrastructure upgrades during refurbishments or building improvements and the capital maintenance programme
- Working with partners to share accommodation and operating costs
- Develop our property assets improving through how they work for us, optimisation of returns and minimisation of costs of operation
- Ensure ownership and occupation of assets is robustly challenged
- Protecting our Listed and heritage assets

##### Year 1 Priority

**E1:** Complete full asset data refresh and benchmark our overall estate performance measures against best practices in other LA's and national standards

**E2:** Review of all existing Leases and outstanding debt due from external clients

**E3:** Appraise operational value, investment return, opportunity costs and social value associated with holding assets to allow informed decisions on the future of assets (Property and Land)

**E4:** Develop service level estate optimisation programmes using 'Asset Challenge' process

**E5:** Review occupancy rates across the council, wider public services and GMCA to ensure optimal utilisation, leading to more energy efficient estate and OPE co-location opportunities

**E6:** Energy action plan (backlog maint, Capital works and associated funding to delivery)

**E7:** Vacant land and asset appraisal Q1 May 20

**E8:** CIPFA compliance report and recommendations

**E9:** Condition surveys schools

##### Year 2-5 Road Map

There will be an annual review of the Estate Optimisation exercise to inform Capital Programmes and planning.

Review and action plan for non income generating, non operational assets.

Annual Service Asset Planning exercise.

Introduce measures to drive A low carbon public estate in line with GMCA to develop a pipeline of public estate assets that can be used to deliver a combined GM-wide programme:

- Energy efficiency/building retrofit on public estate
- Energy generation sites e.g. land or roof space for solar panels or other low carbon generation assets



### Economic Growth and Regeneration

### SAMP Action Plan

#### Corporate Priorities

##### Chief Executives Directorate Plan

- Economic prosperity
- Skills and aspirations
- Attracting businesses and investment
- Protecting and improving our environment

##### People Services Strategic Plan

- The best start in life for every child
- All children will achieve their potential

##### Place Directorate Plan

- Creating jobs and attracting new investment
- Create a workforce responsive to demand
- Grow the local economy and support employment and skills, maximising opportunities to safeguard our long-term viability
- Develop business infrastructure to support the delivery of quality front-line services

#### SAMP Objectives

Contribute to the delivery sustainable housing growth by using Council's assets to control or shape developments with other sectors.

Support infrastructure and land assembly for regeneration projects.

Promote development sites for future growth.

Share the benefits of ownership council's assets through joint-ventures.

Support the delivery of new developments, such as parks, libraries, and health centres.

Support infrastructure and land assembly for regeneration projects.

Promote development sites for future growth.

Share the benefits of ownership council's assets through joint-ventures.

Support the delivery of new developments, such as parks, libraries, and health centres.

#### Year 1 Priority

##### District Centres

The approved plan for Farnworth focuses on the redevelopment of the Farnworth market precinct and Saddle pub site for mixed-use development (residential, commercial and community). Emerging proposals for Horwich, Westhoughton and Little Lever focus on redevelopment of sites. Creation of masterplans and strategies key to enhance economic prospects for each area providing a clear strategy for growth, future proofing towns, building on existing qualities, assets and promoting new activities, releasing their potential as thriving towns.

##### Trinity Gateway

Beechlane (Investments) Ltd Proposed development comprising a 20 storey residential towers of 144 apartments, 30,000 sq.ft. of grade A office space and a 505 space multi storey car park which will serve the development and the town centre in general.

##### Le Mans Hotel

Beechlane have proposed to redevelop all that part of the crescent that is not occupied by the library and museums service to an 87 bedroomed four-star hotel with 17 serviced apartments and a health and wellness spa.

#### Year 2-5 Road Map

##### Church Wharf - Muse

Developments Ltd propose riverside development comprising a mix of 352 homes, an 80 bedroomed hotel and 130,000 sq. ft. of offices and leisure.

##### Blackhorse Street "Digital City" - A

platform of next generation of digital connectivity needed by businesses, tech start-ups, SME's, household names in the borough and beyond. To build strong connections with universities, colleges and industry by developing cutting edge of digital technology, skills, and expertise needed in the 21st century.

##### Victoria Square/Crompton Place

- Bolton Regeneration Limited propose to demolish the existing shopping centre to create a new regional destination attraction comprising retail, food/beverage, residential, hotel, grade A office space, parking and improvements to public realm. Includes the re-instatement of a direct access from Victoria Square to Bradshawgate.

Further work with support wider strategic objectives around

- Digital Strategy
- Heat networks
- Health city

# 4.5

## Corporate Landlord



### Partnerships

#### Corporate Priorities

##### Chief Executives Directorate Plan

- Strong and engaged communities
- Neighbourhood models
- Social value
- Develop stronger, cohesive, confident communities where people feel safe, welcome and connected

##### People Services Strategic Plan

- Age Well
- Live longer, healthier lives.
- Remain independent for as long as possible
- High quality long-term services

##### Place Directorate Plan

- Create a strong and distinctive place
- Places and neighbourhoods which people are proud of
- Create a safe and welcoming Bolton
- Provide joined-up services

#### SAMP Objectives

##### SAMP - Overarching objectives and key priorities:

We will work with Strategic Partners, from both the public and private sector to develop innovative estates initiatives. Key to this will be our continued presence as lead organisation for the Bolton Strategic Estates group which coordinated property and asset programmes across public sector partners, in conjunction with and under the wider governance of the, GMCA Strategic Estates Group. The strategic One Public Estate and Local Asset Review's of public sector estates have sought to maximise the efficiency of the wider public sector corporate asset base to provide an integrated facilities with improved service delivery for users, focused on:

- Place based co-ordination to build and develop integrated services, retail, culture and leisure within neighbourhoods and town centres
- Co-location with other partners
- Integrated service delivery partnership combining public and private expertise and resources
- Provide assets that are easily accessible to communities

### ← SAMP Action Plan →

#### Year 1 Priority

##### Establish Governance framework for SEG partners to progress projects:

- Agree funding and revenue sources budgets to progress programme activity
- Agree 'ringfence' agreements for capital reinvestment of realised assets
- Develop overview of all Partner Programmes

Embed OPE7 and LAR proposals for Farnworth, West Houghton, Great Leaver and Horwich to town centre regeneration masterplans.

Continue to support the integrated health and social care service transformation programmes with progression of projects proposed in OPE7 for neighbourhood integrated working hubs, in conjunction with SEG.

Support, through enabling projects the masterplan aspirations for Royal Bolton Hospital and Blue Light Services.

Establish a Pupil pressures land availability/capital programme.

#### Year 2-5 Road Map

Work across the public sector to maximise the efficiency of the joint estate of some 700+ (building) assets.

- Create SEG Programme Management Office - coordinate cross agency programmes and projects to maximise delivery objectives and progress delivery:
- Borough wide capital investment plan
  - Borough wide geospatial analysis of surplus land into Surplus Land programme
  - Co-location programme
  - Integrated Hub programme
  - Disposals Programme

##### PMO links to wider programmes:

- Town Centre regeneration
- Royal Hospital masterplan
- Bolton Capital programmes (e.g. schools basic need)
- Developer partner/Capital Investment/regeneration programme

Embed energy efficient criteria to all projects, with maxim of target zero carbon and renewable energy generation.

Delivery of projects which enable service transformation.

# 4.6

## Support Housing Growth



### Housing

#### ← SAMP Action Plan →

#### Corporate Priorities

##### Chief Executives Directorate Plan

- Strong and engaged communities
- Economic prosperity
- Neighbourhood models
- Develop stronger, cohesive, confident communities where people feel safe, welcome and connected

##### People Services Strategic Plan

- A place where people choose to study, work, invest and put down roots
- People will remain independent for as long as possible

##### Place Directorate Plan

- Provide quality housing
- A strong and distinctive place
- Places and neighbourhoods which people are proud of
- A safe and welcoming Bolton

#### SAMP Objectives

The SAMP will seek to support Housing Delivery (including Affordable housing):

Contribute to the delivery sustainable housing growth by using Council's assets to control or shape developments with other sectors

Opportunities on Council owned land for annual housing unit numbers and build upon our innovative public and private sector partnerships to maximise the benefit of the corporate asset base.

While releasing public sector land to support housing to provide assets that are easily accessible to communities and to encourage a safe and connected borough with places to live, work, study, visit and socialise.

The SAMP will under pin our strategy to acquire strategic sites to provide affordable housing in areas of economic regeneration

Seek to deliver sustainable MMC (modern methods construction) projects in line with reducing carbon footprint and utilising more brownfield sites.

#### Year 1 Priority

Establish Council Surplus land for housing programme.

##### Support Bolton Housing Delivery Plan

- Identify and allocate land to support housing delivery
- 726 p.a. units (minimum 25% affordable)
- Support Bolton community homes delivery plans
- Secure Homes England funding for sites
- HIVE homes delivery (Brightmet)
- Identify sites suitable for supported living and integrated care facilities to support the aging population
- Support MMC delivery and skills (modular housing)

#### Year 2-5 Road Map

Ongoing assessment of sites identified for release through outputs of Estates Efficiency Programmes

- Partnership Rationalisation Programme (OPE, LAR etc)
- Bolton Council Operational Assets Rationalisation programme

##### Ongoing Surplus Land and site assessment across estate

- Land subject to Estate efficiency modelling for suitability
- Assessment of Land value pre/post outline planning consent
- Assessment to establish cost of readying site for land sale v site valuation improvement
- Move agreed to Programme
- Land subject to categories in Housing Delivery Plan

# Measuring Success and Performance



# 5.0

## Measuring success and performance

Annually the priorities will be identified through the Programme Management office which will be set up in 2020 and appropriate performance measures applied. Overall performance measures for this may include (but are not limited to):

### **Assessment of asset performance**

- Utilisation and improvement to operational requirement satisfaction
- Improvement in the rate of occupation of assets
- Improvement in appropriate financial target
- Reduction in operating costs

### **Reduction in compliance and safety matters**

- Attributable to the asset performance
- Time lost through assets not being adequately maintained
- Areas of risk to safety
- Compliance
- Energy performance
- Maintenance deficiency affecting service delivery

### **Appropriate data improvement relating to time, cost and quality**

- Measurement of the operation of services, contractors, consultants etc.
- Improvement in customer satisfaction results
- Continual process/procedure improvement based on feedback

### **Financial performance indicators for income and expenditure for the estate**

- Returns that reflect risk exposure
- Benchmarks that consider use
- Asset utilisation
- Rate of reduction of the estate

- Current cost of the estate
- Future cost of the estate
- Capital receipts realised against realistic targets
- Improvement in suitability and sufficiency statistics

### **Measures against targets appropriate to the regeneration projects**

- Support from services
- Target delivery for homes
- Community wellbeing and employment benefits
- Measurement of time/cost/quality/risk against key projects being delivered in partnership with others
- Use of s106 contributions measurement against outcomes

### **Performance targets set out in the Regional strategy**

- Reduction in EPC
- Reduction in utility and energy usage
- Reduction in carbon
- Social Value
- Number of jobs and apprenticeships created
- Delivery of affordable housing
- Percentage of land release
- Revenue savings
- GVA benefits to the Bolton economy

Each Pillar will have specific key performance indicators with measurable targets.



# Approach to Governance



# 6.0

## Major development and capital project governance

☞ A key principle of the 'Strategic Asset Management and Major Developments' delivery programme is to ensure the Council's capital investments are managed effectively through the adoption of a streamlined gateway review process that will ensure that:

- » Money is well invested
- » Proposals are thoroughly assessed and align with SAMP and Corporate objectives (Bolton Vision 2030)
- » Projects and Programmes are delivered on time, to budget and quality
- » Change is delivered to a high standard (efficiently and controlled)
- » Benefits and project outcomes are clearly defined and tracked
- » Projects have been through appropriate approval process at key defined stages (Can't pass through a gateway without necessary approval)
- » Capital spend assessments are looked at quarterly to review the gross position, liability and risks to council and partners
- » Communications are improved with clear accountability and responsibility matrix defined on all projects

The gateway review process is owned by the Programme Director Strategic Property and Regeneration and feeds into the Corporate Landlord, Economic Regeneration and Partnership Pillars of the SAMP. This ensures the necessary controls are in place to assess performance of a project and make recommendations to key decision makers involved in deciding whether or not to proceed with Capital programmes and projects.

Each Gateway has clear owners and defined roles and responsibilities to progress matters and attain necessary approval for changes to costs, budgets and scope of works, before proceeding to the next stage.

The principle will be that a minimum amount of time should be taken to provide the necessary assurance where appropriate gateways are planned and programmed (by the dedicated programme manager) with defined projects briefs, milestone plans and RACI\* matrix

*\*RACI - Responsible/Accountable/Consulted/Informed (shows clear roles and responsibilities on projects)*

# 6.1

## Gateway Matrix – BMBC

### Gateway approval process Capital investment property and regeneration

Gateway	Stage	Approval needed
Gateway 0	Strategic business case » Identify service need » Agree project brief » Alignment to SAMP and budget	✓
Gateway 1	Option approval	✓
Gateway 2	Commit to invest*	✓
Gateway 3	Design and scope sign off	✓
Gateway 4	Commit to construct	✓
Gateway 5	Practical completion	✓
Gateway 6	Project closed	✓

The gateway framework shows, high level objectives, key deliverables and critical reporting and approval requirements, from inception to completion of any property and land project or consideration.

*\*\*Adopted and modified based on RIBA plan of works 2020\*\**



# Appendices



# Appendix 1.

## Strategic Asset Management Plan on a Page for Year 1

“Bolton will be a vibrant place, built on strong cohesive communities, successful businesses, and healthy residents. A welcoming place where people choose to study, work and put down roots.”

People Services  
Start Well  
Live Well  
Age Well

Place Priorities  
Regeneration and housing  
Prioritised asset management  
Cleaner and greener borough

The SAMP will provide a five year strategic plan and programme of Asset Priorities for the corporate estate, provide a framework for delivery of projects that allow for informed asset budget setting and provision of an efficiently managed estate. Helping to build sustainable and resilient communities that support the well-being of current and future generations.

1. Big Up Bolton
2. Strong and Engaged Communities
3. Economic Prosperity
4. Skills and Aspirations
5. Social Value
6. Neighbourhood Models

*Corporate Vision*

*Corporate Priorities*

*SAMP Vision*

*Property AMP*

*Property Objectives*



### **Corporate Landlord**

Embed a culture through a Corporate landlord model that recognises that property assets are a key corporate resource, where decisions need to be made that are linked to corporate and service objectives that delivers good financial and service outcomes for people of Bolton.



### **Estate Optimisation**

Maintain and develop the management of our property assets to improve over time how those assets work for us, optimise returns and minimise the costs of operation, ensure ownership and occupation of assets is robustly challenged and running costs are minimised.



### **Economic Growth and Regeneration**

Support economic growth and regeneration in Bolton. Unlock the potential to grow the local economy and increase employment and graduate retention through creating jobs and skills towards the millennial revolution.



### **Partnerships**

Develop Innovative place based One Public Estate and Private partnerships to maximise the benefit of the corporate asset base and improve the area providing a safe and connected borough with places to live, work, study, visit and socialise.



### **Housing**

Supporting the locality through the Housing delivery plan providing the right types of houses in the right locations.

Aligning property with housing strategy and planning policy.

# Appendix 2.

## Asset Management Policy

“ The policy will make sure that the SAMP is reflected in the decisions of all parts of the council  
It sets out the ‘rules of behaviour’ for the council, as far as property and land decision making is concerned.

### Core principles of the policy:

- » To plan and manage property as a corporate resource for the benefit of the people of Bolton
- » Provide the right property, fit for purpose, in the right place, to meet current and future service needs
- » Manage property effectively and efficiently, optimising financial and commercial opportunities from the rationalisation and disposal of land and buildings
- » Use land and buildings to stimulate economic development and growth
- » To promote joint working, agile working and virtual working where it will provide benefits for service delivery, cost/energy efficiencies and a healthy motivated workforce



# Appendix 3.

## Disposals Policy



As part of the SAMP, land and property assets held by the council will be appraised and considered for disposal and potentially surplus to requirements if any of the following examples apply:

- » The Asset no longer makes a positive contribution to delivery of council services
- » The revenue and capital demands to maintain far outweigh any income of financial or policy benefits
- » Has no potential for future strategic regeneration and/or redevelopment purposes
- » An alternative site can provide a more cost effective and efficient service
- » No adopted and resourced council plan/policy/strategy, that could bring the asset into use in foreseeable future
- » No potential advantageous shared use with partners (One Public estate/CAT)

\*\* We are reviewing all existing vacant estate as priority and then progress to occupied estate or land using the above criteria – Asset challenge process\*\*

# Appendix 4.

## Acquisitions Policy

Land and property interests should be considered for acquisition if the following circumstances apply:

- » The acquisition will make a positive contribution to the current or future delivery of council services
- » The acquisition has economical benefits in reducing occupational costs (revenue and capital)
- » Option appraisal has been undertaken which highlights acquisition as the most economic and efficient means of service delivery, for council and wider public services
- » The acquisition of the interest has potential for future strategic regeneration and/or redevelopment, or contributes to wider corporate objectives and appropriate funding has been identified



# Appendix 5.

## CAT (Community Asset Transfer)

“ Where a community group or voluntary organisation has a business plan for delivering activities and services from a council owned asset, the council will consider a request to transfer that asset – by using the agreed policy and governed by the SAMP, only.

### Eligibility:

Each organisation wishing to apply for CAT needs to meet the following criteria:

- » Charitable or not-for-private-profit organisation
- » Generate social, economic or environmental benefits which directly benefit the people of Bolton
- » Benefit a wide and diverse a range of local people as possible
- » Have the capacity and resources to manage the asset and have directors or committee members who have the necessary experience and skill

\* We will continually make available Assets available for transfer and provide a defined expression of interest form for interested parties to apply

\*\* We will also need to consider and appraise historic and potentially informal asset transfers to understand the current economic impact on council revenues



# Appendix 6.

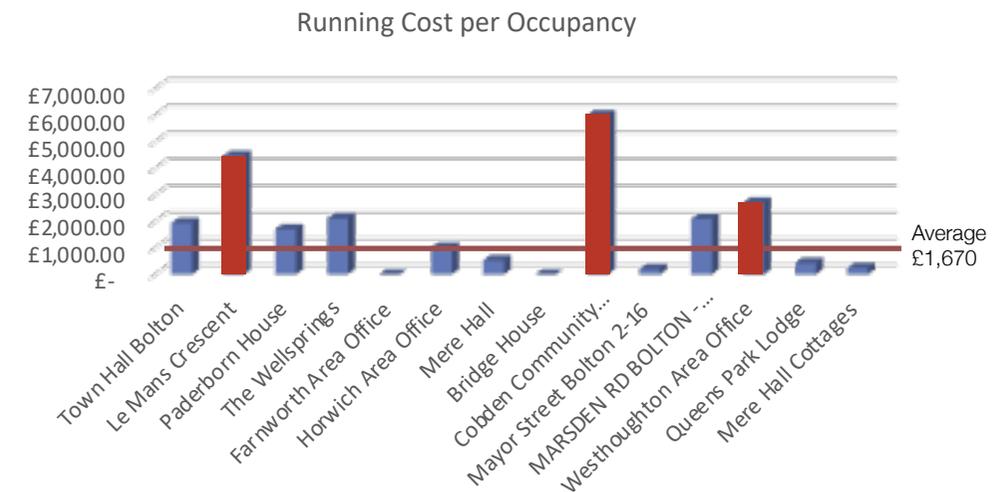
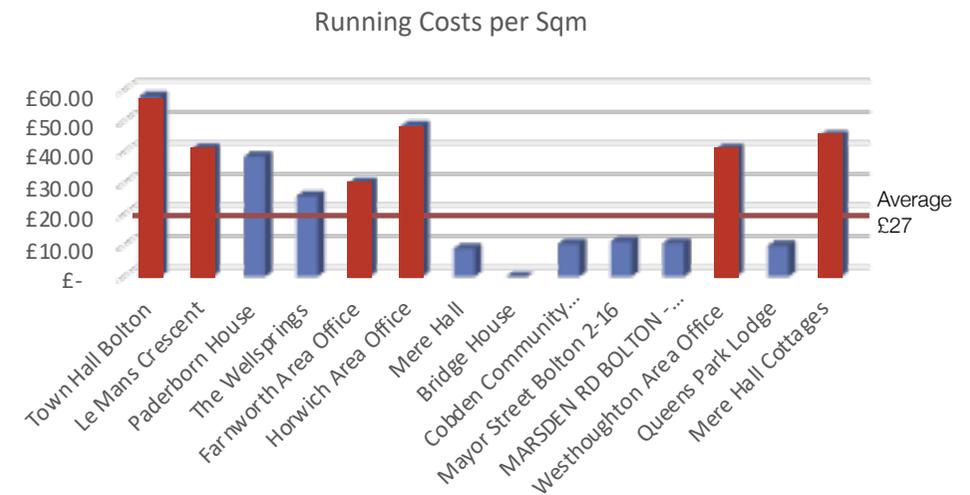
## Assessing a sample of the estate (14 administration assets)

To demonstrate the value of assessing asset performance, we have initially reviewed a sample of 14 administration assets. The intention is to replicate this process across the other sub-portfolios.

Of the 14 key assets, running cost per square meter ranges from £9.90 to £57.93. From an occupancy perspective two buildings are outliers demonstrating significant running costs and low occupancy. These are Le Mans Crescent and Cobden Community centre. Based on the data analysis these are the first two buildings that will be assessed for asset optimisation with Le Mans Crescent as the priority based on the high running costs and low occupancy.

The graphs highlight some anomaly figures e.g. Farnworth Area Office currently has no occupants and therefore it distorts the running cost per occupancy figures. However, the running cost are above average indicating that the associated costs are irreconcilable. Westhoughton area office also has a high cost per occupant and per SQM, which indicates that this asset is under utilised.

Asset	Total Running Cost	Running Cost per occupancy	Comments
Town Hall Bolton	£1,587,711.15	£1,933.87	
Le Mans Crescent	£606,843.39	£4,462.08	
Paderborn House	£462,477.79	£1,694.06	
The Wellsprings	£320,068.43	£2,105.71	
Farnworth Area Office	£142,765.15		No occupancy
Horwich Area Office	£74,689.05	£1,009.31	
Mere Hall	£10,551.00	£527.55	
Bridge House	£ - £0.00		Not used
Cobden Community Centre	£6,001.00	£6,001.00	
Mayor Street Bolton 2-16	£4,920.00	£205.00	
Marsden Rd Bolton - Base	£121,166.62	£2,089.08	
Westhoughton Area Office	£134,993.75	£2,699.88	
Queens Park Lodge	£6,345.00	£423.00	
Mere Hall Cottages	£16,722.93	£238.90	



# Appendix 6. cont'd

## Assessing a sample of the estate (14 administration assets)

The maintenance work on each asset is given a rating from A-D, A being the best condition and D needing emergency works carrying out.

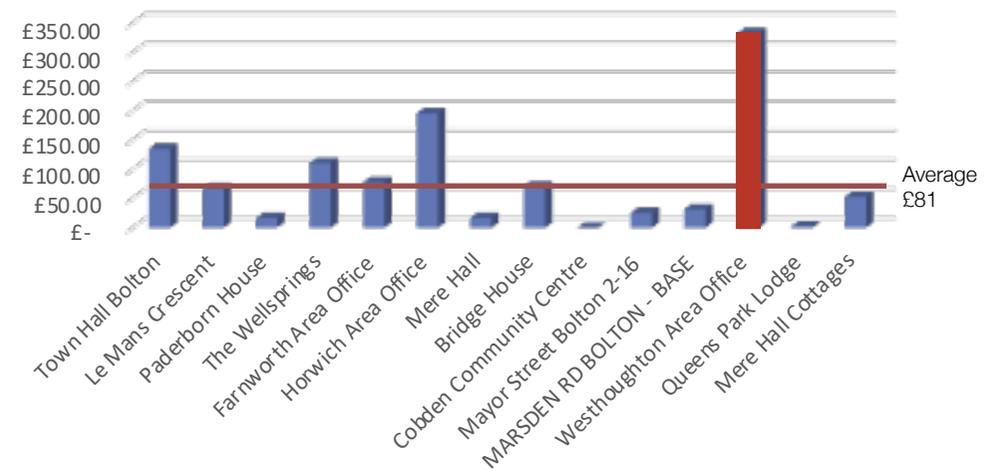
The backlog maintenance outline the total cost to bring the building up to a rating of B. Currently 7% need immediate works carrying out totally £800 and over half of the assets are below standard at a C rating.

Bolton Town Hall, Le Mans Crescent Westhoughton Area Office and The Well

Springs have the highest Maintenance backlog and subsequently cost per square meter. These assets need to be targeted first to bring the efficiency costs to a overall lower rate, ensuring the asset is utilised properly and fits the needed capacity.

The data demonstrates that Westhoughton Area office has high backlog maintenance, high running costs and low occupancy. This building presents a prime example for estate optimisation (as outlined in Section 4.4).

Backlog Maintenance Cost per SQM



	Backlog Maintenance (14 assets)	Cost per m <sup>2</sup>	Immediate works
Town Hall Bolton	£3,701,750.00	£135.07	N/A
Le Mans Crescent	£990,850.00	£67.18	N/A
Paderborn House	£201,300.00	£16.80	N/A
The Wellsprings	£1,371,400.00	£110.75	N/A
Farnworth Area Office	£367,750.00	£77.72	N/A
Horwich Area Office	£301,400.00	£195.50	N/A
Mere Hall	£19,589.00	£16.72	N/A
Bridge House	£23,620.00	£70.41	£400
Cobden Community Centre	£ -	£-	N/A
Mayor Street Bolton 2-16	£11,020.00	£25.33	£100
Marsden Rd Bolton - Base	£353,700.00	£31.33	N/A
Westhoughton Area Office	£1,094,800.00	£332.84	N/A
Queens Park Lodge	£1,665.00	£2.60	£300
Mere Hall Cottages	£19,588.75	£53.06	N/A

Current Building Ratings

