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Date: Thursday, 17 February 2022

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Dear Member

## **CABINET - TUESDAY, 22 FEBRUARY 2022**

I am now able to enclose, for consideration at the Tuesday, 22 February 2022 meeting of the Cabinet, the following reports that were unavailable when the agenda was printed.

<b>Agenda No</b>	<b>Item</b>	<b>Page</b>
8.	<b>Torbay Council Strategic Asset Management Plan</b>	(Pages 2 - 64)

Yours sincerely

Lisa Antrobus  
Clerk

**Meeting:** Cabinet/Council

**Date:** 22 February 2022 / 3 March 2022

**Wards affected:** Torbay Wide

**Report Title:** Torbay Council Strategic Asset Management Framework

**When does the decision need to be implemented?** As soon as possible

**Cabinet Member Contact Details:** Councillor Swithin Long, Cabinet Member for Economic Regeneration, Tourism & Housing, [Swithin.Long@torbay.gov.uk](mailto:Swithin.Long@torbay.gov.uk)

**Director Contact Details:** Kevin Mowat, Director of Place, [Kevin.Mowat@torbay.gov.uk](mailto:Kevin.Mowat@torbay.gov.uk)

**Supporting Officer Contact Details:** Paul Palmer, TDA Head of Assets & Facilities Management, [paul.palmer@tda.uk.net](mailto:paul.palmer@tda.uk.net)

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## 1. Purpose of Report

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- 1.1 The previous Torbay Council Corporate Asset Management Plan covered the period 2015 ~ 2019 and had been updated on an annual basis. The Corporate Asset Management Plan was last updated in September 2019 following a technical review by the then Director of Corporate Services in light of the change in governance arrangements from Elected Mayor to Leader and Cabinet.
- 1.2 The draft Strategic Asset Management Framework is a completely refreshed suite of documents and it is presented for approval to Full Council. The framework considers the Council's approach to the strategic management of its assets, how it will support service delivery, provide the Council with income and how it will fulfil its mission to support, enable and empower its residents, our communities, and our partnerships, promote growth and place shaping within Torbay; and deliver the Torbay Community and Corporate Plan 2019 ~ 2023 One Torbay: Working for all.
- 1.3 The draft Strategic Asset Management Framework was debated by Cabinet on 22<sup>nd</sup> September 2021 and agreed the Framework should be published for consultation as part of the budget consultation for 2022 / 2023. The document was reviewed by the Overview & Scrutiny Committee on 10<sup>th</sup> November 2021 making two recommendations. The first being for Cabinet to review the wording of the Strategic Asset Management Plan to ensure that it is easier to understand using Plain English. Secondly, that lease agreements for assets on beachfronts be reviewed to tighten them up to address their impact on climate change and

the type of take away waste they create and how they manage their waste to ensure they are not polluting our sea and beaches.

- 1.4 The Strategic Asset Management Framework was published for consultation on 17<sup>th</sup> January 2022 through to 8<sup>th</sup> February 2022 alongside the budget consultation. The outcome of the consultation and revision of the Strategic Asset Management Framework will be considered at Cabinet on 22<sup>nd</sup> February 2022 with recommendation to Council on 3<sup>rd</sup> March 2022.
- 1.5 The Strategic Asset Management Framework is formed of two separate documents the Asset Management Strategy 2022 – 2027 and Asset Management Policy 2022 – 2027.

## 2. Reason for Proposal and its benefits

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- 2.1 We want Torbay and its residents to thrive.
- 2.2 We want Torbay to be a place where we have turned the tide on poverty and tackled inequalities; where our children and older people will have high aspirations and where there are quality jobs, good pay, and affordable housing for our residents.
- 2.3 We want Torbay to be the premier resort in the UK, with a vibrant arts and cultural offer for our residents and visitors to enjoy; where our built and natural environment is celebrated and where we play our part in addressing the climate change emergency.
- 2.4 The Strategic Asset Management Framework consisting of the Asset Management Strategy 2022 – 2027 and Asset Management Policy 2022 – 2027 will form part of a suite of key strategic documents for the Council's vision for the built environment which have already been developed in consultation with the community. It focuses on the places where people live and work, maximising opportunities for inward investment and infrastructure that delivers high quality design in our buildings and public realm that increases resilience. It allows for flexibility and growth in the local economy, ensuring any new development contributes positively to community amenities and infrastructure.
- 2.5 The reason for the decision is that it is intended that Torbay Council's Strategic Asset Management Framework will define the principles through the Strategy, criteria and process and application through the Policy by which decisions will be made regarding the use of Council assets. The adoption of the Asset Management Strategy 2022 – 2027 and Asset Management Policy 2022 – 2027 will supersede the existing Corporate Asset Management Plan (2015 ~ 2019).

## 3. Recommendation(s) / Proposed Decision

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- 3.1 That Council be recommended to approve the draft Asset Management Strategy 2022 – 2027 set out at Appendix 1 to the submitted report.

- 3.2 That the Council be recommended to request the Monitoring Officer to update the Council Constitution to reflect the Corporate Asset Management Strategy 2022 – 2027 is reviewed and approved by Full Council every 5 years.
- 3.3 That subject to Council approving 3.1 above the Cabinet approves the draft Asset Management Policy 2022 – 2027 as set out at Appendix 2 to the submitted report.
- 3.4 That the Asset Management Operational Delivery Plan be prepared and delegated to the Director of Place, in consultation with the Cabinet Member for Economic Regeneration, Tourism and Housing, for approval.

## **Appendices**

Appendix 1: Draft Asset Management Strategy 2022 ~ 2027

Appendix 2: Draft Asset Management Policy 2021 ~ 2027

## **Background Documents**

Asset Management Framework - Introduction.

# Supporting Information

## 1. Introduction

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- 1.1 The Torbay Council Strategic Asset Management Framework sets out the Council's approach to the strategic management of its assets, how it will support service delivery, provide the Council with income and how it will fulfil its mission to support, enable and empower its residents, our communities and our partnerships, promote growth and place shaping within Torbay and deliver Torbay Community and Corporate Plan 2019- 2023 One Torbay: Working for all.
- 1.2 To support this Torbay Council will adopt an Asset Management Framework which comprises of two separate documents:
- Asset Management Strategy 2022 - 2027
  - Asset Management Policy 2022 - 2027
- 1.3 The advantage of adopting such a framework is that many areas relating to the Council's approach to its land and property assets is likely to remain constant for several years. By adopting two separate elements will allow for each to be reviewed at different times. The Asset Management Strategy 2022 – 2027 will establish clear principles by which the Council will manage its land and buildings. It will remain in place for the next 5 years but can be reviewed more frequently to ensure it is still relevant to what it is trying to achieve.
- The Asset Management Strategy 2022 – 2027 will be approved by Full Council.
- 1.4 The Asset Management Policy 2022 – 2027 provides an overview of the Council's land and property estate, together with the main priorities for managing and developing that estate over the next five years. The Policy will set out how the Council will implement the identified principles as described in the Strategy. It will be reviewed and amended, every 3 years to ensure the estate fully supports the Torbay Council Community and Corporate Plan 2019- 2023, by contributing to the key objectives for property asset management.
- The Asset Management Policy 2022 – 2027 will be approved by Cabinet.
- 1.5 Sitting outside of the framework will be the Asset Management Operational Delivery Plan which further describes the specific activities to achieve the objectives of the Asset Management Policy 2022 ~ 2027. The Operational Delivery Plan will be categorised under two thematic headings of Strategic and Operational Actions.
- 1.6 The Operational Delivery Plan will be populated and approved by Torbay Council's Director of Place. The Operational Delivery Plan will be reviewed and monitored regularly by the relevant Portfolio Holder and Cabinet where necessary. It will continually change to reflect

achievements of actions and capture new priorities and initiatives as they are identified. Consequently, the Operational Delivery Plan will not be a policy document.

- 1.7 It is intended that Torbay Council's Strategic Asset Management Framework will define the principles, criteria and processes through which decisions will be made regarding the use of Council assets.
- 1.8 The adoption of the Asset Management Strategy 2022 – 2027 and Asset Management Policy 2022 – 2027 will supersede the existing Corporate Asset Management Plan (2015 ~ 2019).
- 1.9 The recommendations by the Overview and Scrutiny Committee on the 10<sup>th</sup> November 2021 to Cabinet have been actioned. The text used in both the Asset Management Strategy and Policy has been reviewed and amended wherever relevant, so that both documents are easier to understand. Work on reviewing lease arrangements for beachfront assets is being reviewed and will be amended when leases are renewed, or new leases granted.

## 2. Options under consideration

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- 2.1 None.

## 3. Financial Opportunities and Implications

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- 3.1 Due to the ongoing financial challenges facing the Authority and the potential for further future reductions in the Revenue Support Grant (RSG), unless there is specific approval at full Council to the contrary, the Council will always seek to maximise revenue streams and the full market receipt whether by way of freehold disposal or leasehold interest from assets classified as 'Investments' or 'Leased Estate, other Land & Buildings'.
- 3.2 Disposal of other asset groups whether by way of freehold disposal or leasehold interest will be considered alongside community aspirations and due regard to the purpose of ownership, including the operation of Council services.

## 4. Legal Implications

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- 4.1 There are no legal implications with this proposal.

## 5. Engagement and Consultation

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- 5.1 The draft Asset Management Strategy 2022 – 2027 and Asset Management Policy 2022 – 2027 has been presented internally for consultation, including SWISCo and TDA.

- 5.2 Following approval by Cabinet in September 2021, the Asset Management Strategy 2022 – 2027 and Asset Management Policy 2022 – 2027 was published alongside the Budget for consultation externally. The consultation period was 17<sup>th</sup> January 2022 – 8<sup>th</sup> February 2022. Four responses were received all agreeing or strongly agreeing to the principles set out in the Asset Management Strategy. No responses disagreed with the principles proposed.

## 6. Purchasing or Hiring of Goods and/or Services

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- 6.1 Not applicable.

## 7. Tackling Climate Change

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- 7.1 One of the clear principles by which the Council will manage its land and buildings and guide future decision making is working towards creating a carbon neutral estate by 2030.
- 7.2 This will be achieved by developing actions through the Carbon Neutral Council Action Plan (ready for delivery in 2022) to understand how the Council's operational estate will transition towards carbon neutral for 2030. Other initiatives will also include a review of Council assets in relation to climate change and environmental implications, improving EPC ratings across the leased estate in line with government and our own carbon neutral targets.

## 8. Associated Risks

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- 8.1 The adoption of the Asset Management Strategy 2022 – 2027 and Asset Management Policy 2022 – 2027 is fundamental in ensuring the Council is a leading public sector organisation for property asset management. The principles set out in the Asset Management Strategy 2022 ~ 2027 will ensure the Council can deliver an effective and efficient service that will also allow us to manage, maintain and develop the Council's estate following a robust and clear framework.
- 8.2 The absence of an up-to-date Asset Management Plan leads to decisions being made on an individual and reactive basis with little or no strategic guidance being considered.

## 9. Equality Impacts - Identify the potential positive and negative impacts on specific groups

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	Positive Impact	Negative Impact & Mitigating Actions	Neutral Impact
Older or younger people	Adoption of SAMP is likely to have a positive impact on locality.		

People with caring Responsibilities	Adoption of SAMP is likely to have a positive impact on locality.		
People with a disability	Adoption of SAMP is likely to have a positive impact on locality.		
Women or men			There is no differential impact.
People who are black or from a minority ethnic background (BME) (Please note Gypsies / Roma are within this community)			There is no differential impact.
Religion or belief (including lack of belief)			There is no differential impact.
People who are lesbian, gay or bisexual			There is no differential impact.
People who are transgendered			There is no differential impact.
People who are in a marriage or civil partnership			There is no differential impact.
Women who are pregnant / on maternity leave			There is no differential impact.
Socio-economic impacts (Including impact on child poverty issues and deprivation)	Adoption of SAMP is likely to have a positive impact on locality.		
Public Health impacts (How will your proposal impact on the general health of the population of Torbay)	Adoption of SAMP is likely to have a positive impact on locality.		

## 10. Cumulative Council Impact

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10.1 None.

## 11. Cumulative Community Impacts

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11.1 None.

# Asset Management Framework Introduction

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Agenda Item 8  
Appendix 1

# Torbay Council Asset Management Framework Introduction

## Introduction

The Torbay Council Strategic Asset Management Framework sets out the Council's approach to the strategic management of its assets, how it will support service delivery, provide the Council with income and how it will fulfil its mission to support, enable and empower its residents, our communities and our partnerships, promote growth and place shaping within Torbay and deliver Torbay Community and Corporate Plan 2019- 2023 One Torbay: Working for all.

To support this Torbay Council will adopt an Asset Management Framework which comprises of two separate documents:

- **An Asset Management Strategy 2022 - 2027**
- **An Asset Management Policy 2022 - 2027**

The advantage of adopting such a framework is that many areas relating to the Council's approach to its land and property assets is likely to remain constant for several years. However, by adopting two separate elements will allow for each to be reviewed at different times. The Asset Management Strategy 2022 – 2027 will establish clear principles by which the Council will manage its land and buildings. It will remain in place for the next 5 years but can be reviewed more frequently to ensure it is still relevant to what it is trying to achieve. The Asset Management Strategy will be approved by Full Council.

The Asset Management Policy 2022 -2027 provides an overview of the Council's land and property estate, together with the main priorities for managing and developing that estate over the next five years. The Policy will set out how the Council will implement the identified principles as described in the Strategy. It will be reviewed and amended, every 3 years to ensure the estate fully supports the Torbay Council Community and Corporate Plan 2019- 2023, by contributing to the key objectives for property asset management. The Asset Management Policy will be approved by Cabinet.

Sitting outside of the framework will be the Asset Management Operational Delivery Plan which further describes the specific activities to achieve the objectives of the Asset Management Policy 2022 ~ 2027. The Operational Delivery Plan will be categorised under two thematic headings of Strategic and Operational Actions.

The Operational Delivery Plan will be populated and approved by Torbay Council's Director of Place. The Operational Delivery Plan will be reviewed and monitored regularly by the relevant Portfolio Holder and Cabinet where necessary. It will continually change to reflect achievements of actions and capture new priorities and initiatives as they are identified. Consequently, the Operational Delivery Plan will not be a policy document.

It is intended that Torbay Council's Strategic Asset Management Framework will define the principles, criteria and processes through which decisions will be made regarding the use of Council assets.

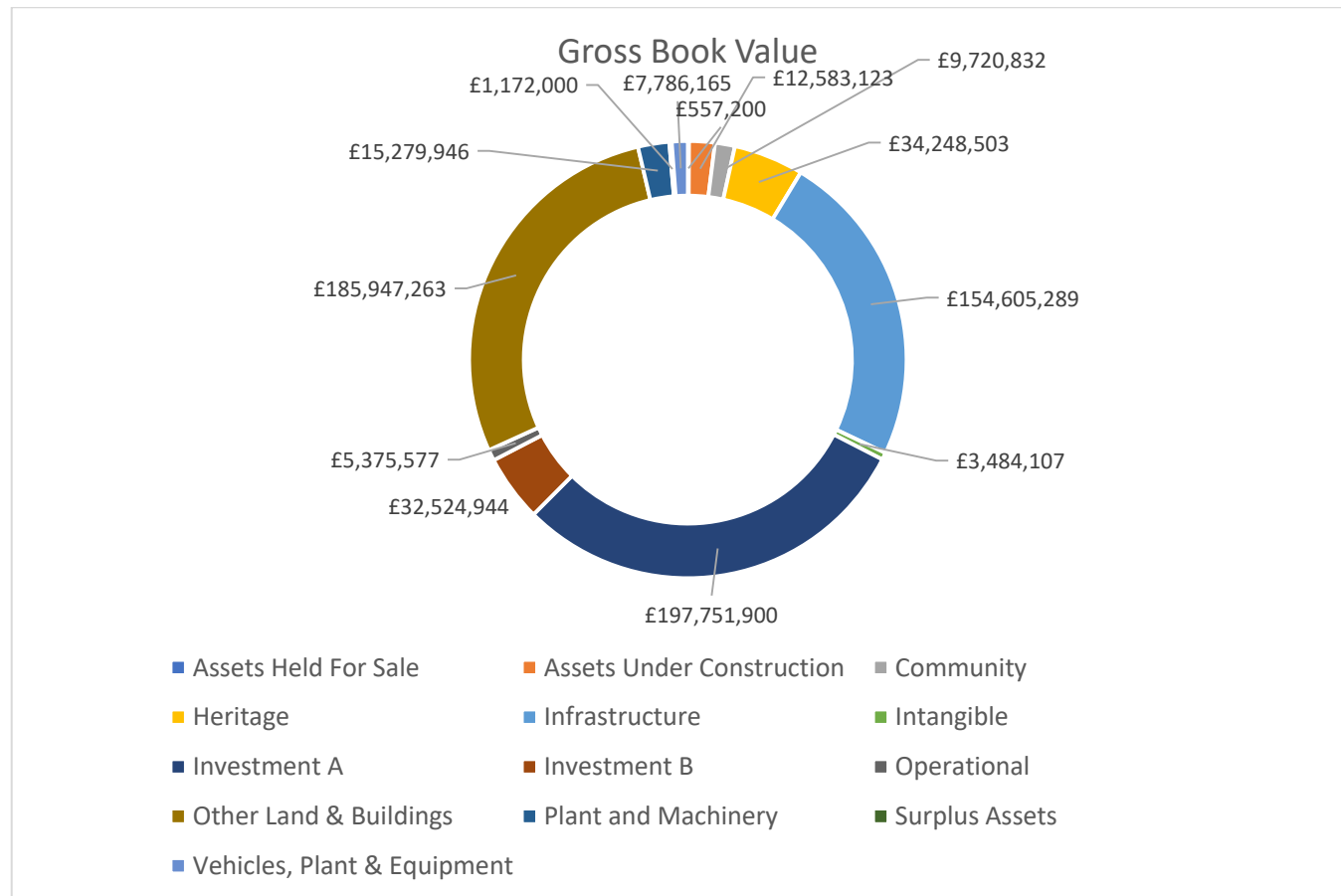
The adoption of the Asset Management Strategy 2022 - 2027 and Asset Management Policy 2022 - 2027 will supersede the Corporate Asset Management Plan (2015-2019).



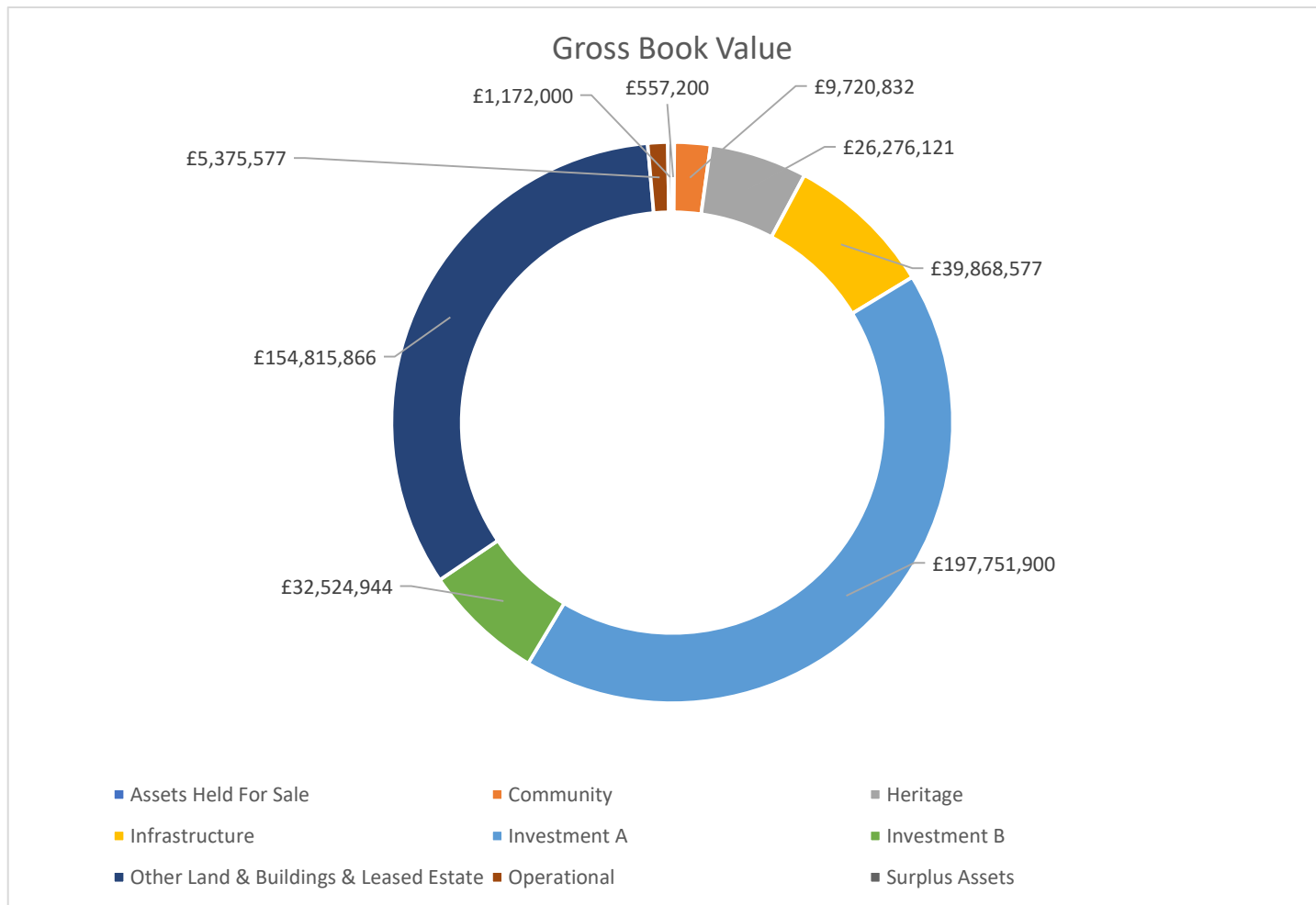


## Context

As of April 2021, the Council owns assets with a Gross Book Value of c.£661m. The assets comprise of a range of schedules, including land and buildings, investment assets, operational properties, those held for sale or under construction, intangible assets, infrastructure, plant and machinery, heritage and community assets. These assets are located both inside and outside of Torbay.



The Council's land and buildings equate to over 70% of the Gross Book Value, totalling £468m. The asset base comprises a total of 1,803 assets and is divided across different schedules as seen below:



The operational estate comprises of 20 assets and the remaining non-operational assets include the let estate, community and heritage assets, the investment portfolio, assets under construction, surplus assets or assets managed externally (such as land and buildings managed by the Torbay Coast & Countryside Trust (TCCT)) and education assets under the control of school academies. The majority of the assets are owned freehold.

## Key Drivers for Change

The stated ambition in the Torbay Community and Corporate Plan 2019 ~ 2023 One Torbay: Working for all, is for Torbay and its residents to thrive. A place where we have enabled the tide on poverty to be turned and tackled inequalities, where our children and older people will have high aspirations with a university in the Bay and where there are quality jobs, good pay and quality housing for our residents and a place where we address the climate change emergency. We want Torbay to be a premier resort in the UK, with a vibrant arts and cultural offer for our residents and visitors to enjoy. Importantly we want to be a Council that supports and enables its residents, we want to be recognised as an enabling council, a council that our residents can be proud of.

The Strategic Asset Management Plan will form part of a suite of key strategic documents for the Council's vision for the built environment which have been developed in consultation with the community. These include:

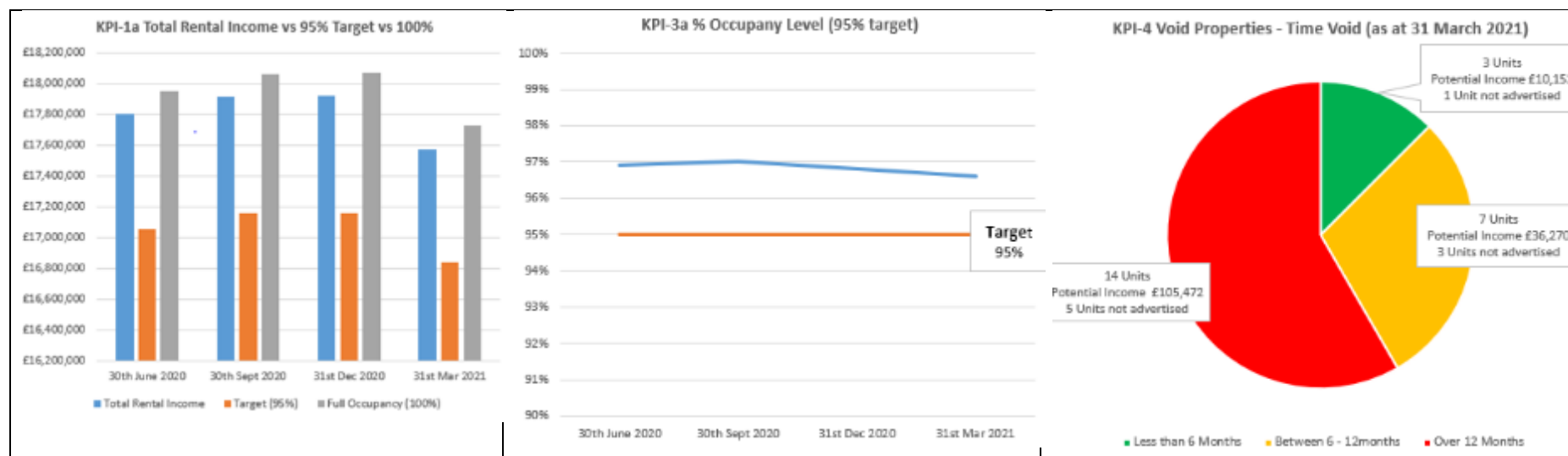
- [Torbay Community and Corporate Plan 2019- 2023 One Torbay: Working for all](#)
- [Economic Recovery Plan – Respond, Recover, Reposition](#)
- [Torbay Local Plan 2012 – 2030](#)
- [Torbay Heritage Strategy 2021 to 2026 Part 1](#)
- [Torbay Housing Strategy 2020 - 2025](#)
- [Tor Bay Harbour - Port Masterplan](#)
- [Energy and Climate Change Strategy](#)
- [Torbay Local Development Scheme 2017](#)
- Torbay Council Highway Asset Management Strategy (Emerging)
- [Paignton Neighbourhood Plan](#)
- [Torquay Neighbourhood Plan](#)

- [Brixham Peninsula Neighbourhood Plan](#)

It will focus on the places where people live and work, maximising opportunities for housing, inward investment and infrastructure that delivers high quality design in our buildings and public realm that increases resilience. It will allow for flexibility and growth in the local economy, ensuring any new development contributes positively to community amenities and infrastructure. The Highway network is one of the Council's biggest asset responsibilities outside of the land and property portfolio. The Council's emerging Highway Asset Management Strategy should be embedded with this document and contribute to the overall strategic approach to the management of the Council's assets.

The Council's land & property portfolio generates a significant revenue for the authority. As of 31<sup>st</sup> March 2021, it was producing an annual rental income of c.£17.5m and achieving a 96.5% occupancy level. The performance and management of the Council's asset portfolio is a commissioned service undertaken by TDA; a company wholly owned by Torbay Council.

## Land & Property Headlines – 31<sup>st</sup> March 2021



## Conclusion

This introduction sets out the Asset Management Framework and how it links together the Asset Management Strategy 2022 – 2027 and the Asset Management Policy 2022 - 2027. The Strategic Asset Management Framework outlines the key strategic objectives for Torbay Council's land and buildings over the next five years.

Sitting outside of the Asset Management Framework is the Asset Management Operational Delivery Plan, which further describes the specific activities to achieve these objectives, categorised under two thematic headings of Strategic and Operational Actions. The Operational Delivery Plan will be populated and approved by Torbay Council's Director of Place.

The Operational Delivery Plan will be reviewed and monitored regularly by the relevant Portfolio Holder and Cabinet, where necessary. It will continually change to reflect achievements of actions and capture new priorities and initiatives as they are identified. Consequently, the Asset Management Action Plan will not be a policy document.





# Asset Management Strategy

## 2022 - 2027

# Asset Management Strategy 2022 - 27

The Torbay Council Strategic Asset Management Plan sets out the Council's approach to the strategic management of its assets, how it will support service delivery, provide the Council with income and how it will fulfil its mission to support, enable and empower its residents, our communities and our partnerships, promote growth and place shaping within Torbay and deliver Torbay Community and Corporate Plan 2019- 2023 One Torbay: Working for all.

To support this Torbay Council will adopt a new Asset Management Framework which comprises of two separate elements:

- **An Asset Management Strategy 2022 - 2027**
- An Asset Management Policy 2022 - 2027

The advantage of adopting such a framework is that many areas relating to the Council's approach to its land and property assets is likely to remain constant for several years. However, by adopting two separate elements will allow for each to be reviewed at different times. The **Asset Management Strategy 2022 - 27** will establish clear principles by which the Council will manage its land and buildings. It will remain in place for the next 5 years but can be reviewed more frequently to ensure it is still relevant to what it is trying to achieve. The Asset Management Strategy will be approved by Full Council.

The Asset Management Policy 2022 – 27 provides an overview of the Council's land and property estate, together with the main priorities for managing and developing that estate over the next five years. The Policy will set out how the Council will implement the identified principles as described in the Strategy. It will be reviewed and amended, every 3 years to ensure the estate fully supports the Torbay Council Community and Corporate Plan 2019- 2023, by contributing to the key objectives for property asset management. The Asset Management Policy will be approved by Cabinet.

Sitting outside of the framework will be an Asset Management Operational Delivery Plan which further describes the specific activities to achieve the objectives of the Asset Management Policy 2022 ~ 2027. The Operational Delivery Plan will be categorised under two thematic headings of Strategic and Operational Actions.

The Operational Delivery Plan will be populated and approved by Torbay Council's Director of Place. The Operational Delivery Plan will be reviewed and monitored regularly by the relevant Portfolio Holder and Cabinet where necessary. It will continually change to reflect achievements of actions and capture new priorities and initiatives as they are identified. Consequently, the Operational Delivery Plan will not be a policy document.

It is intended that Torbay Council's Strategic Asset Management Framework will define the principles, criteria and processes through which decisions will be made regarding the use of Council assets.

The adoption of the Asset Management Strategy 2022 - 2027 and Asset Management Policy 2022 - 2027 will supersede the Corporate Asset Management Plan (2015-2019).



## Asset Management Strategy

The aim of the Asset Management Strategy is to establish clear principles by which the Council will manage its land and buildings. It will remain in place for the next 5 years but will be reviewed regularly to ensure it is still relevant to what it is trying to achieve. This Strategy identifies seven principles that set out the Council's approach to asset management and guide future decision making through processes that will enable delivery at pace.

### Principle 1

- Embed a Corporate Landlord model, that will assist in the consolidation of the estate, based on service requirement requirements.

### Principle 2

- Consolidate operational assets to decrease the number of single-use assets, reduce revenue costs and create multi-functional property, which is fit for purpose, in the right place and supporting service improvement.

### Principle 3

- Work towards creating a carbon neutral estate by 2030.

Principle 4

- Rationalise the estate by reviewing all non-operational and surplus assets to identify opportunities to create or increase revenue income, provide investment opportunities or deliver capital receipts to stimulate development and growth.

Principle 5

- Use our land and buildings to support the provision of new homes, encourage development and growth, supporting local business needs and encouraging new business to Torbay.

Principle 6

- Develop a robust asset management plan to invest properly in all retained assets, to ensure they are fit for the future in supporting excellent service delivery.

Principle 7

- To work collaboratively and promote joint working between Torbay Council, Brixham Town Council, Health and blue light authorities and other Voluntary, Community and Faith Sector organisations to identify wider opportunities to benefit the community.



## Our Objective

Our objective is to be one of the leading public sector organisations for property asset management and development. To achieve this, we will adopt the seven principles set out above. The principles describe the Council's commitment to property asset management and will ensure we deliver an effective and efficient service that will allow us to manage, maintain and develop our property and land portfolio.

To assist in applying the principles identified in the Asset Management Strategy each asset is categorised, by property type, into one of seven identified asset groups. The reasons for holding these assets will vary and as a result, we may need to measure performance, and treat those assets in different ways. The seven asset groups are as follows:

Community, Heritage, Infrastructure, Investment, Leased Estate, Other Land & Buildings, Operational and Surplus.

A detailed definition for each of the asset groups is found in Asset Management Policy 2022 - 2027.

## Applying the Principles

Embed a Corporate Landlord model, that will assist in the consolidation of the estate, based on service area requirements.

- Provide a clear decision-making process and challenge on all property matters
- Ensure our estate is integrated with other resources in a clear decision-making framework
- Ensure costs are minimised through economies of scale and use or return from assets is maximised
- Make certain service areas are adequately accommodated with an appropriate operational estate if required
- Assets are maintained and managed in accordance with corporate strategic priorities and relevant property and health & safety legislation

Consolidate operational assets to decrease the number of single-use assets, reduce revenue costs and create multi-functional property, which is fit for purpose, in the right place and supporting service improvement.

- Ensure retained property is suitable and sufficient for service delivery
- Ensure retained property is flexible, agile and able to respond to future need, whether cultural or behavioural
- Work with service areas and partners to understand longer term requirements
- Engage with community groups and stakeholders to identify improved service delivery options
- Ensure retained assets are secure, safe, and meet all statutory requirements

#### Work towards creating a carbon neutral estate by 2030.

- Develop actions through the Carbon Neutral Council Action Plan (ready for delivery in 2022) to understand how our operational estate will move towards carbon neutrality by 2030.
- Ensure that asset management remains high on the agenda for the Council's Carbon Neutral Officers' Group chaired by Divisional Director - Planning, Housing & Climate Emergency
- Aim to reduce energy and water consumption and CO<sub>2</sub> emissions, through the active management of the estate and by minimising energy and water use, using low carbon heat and renewable power where appropriate and in line with the ever-tightening net zero national policy.
- Develop projects so the Council is in a position to obtain funding to support the decarbonisation of our estate.
- Review Council assets in relation to climate change and environmental implications, improving EPC ratings across the leased estate in line with government and our own carbon neutral targets.
- As soon as possible, establish robust energy and water consumption data for the Council's operational estate to contribute to the Council's carbon footprint.
- Adopt Green lease provisions and engage existing tenants, particularly those located close to our coastline regarding their waste disposal.

Rationalise the estate by reviewing all non-operational and surplus assets to identify opportunities to create or increase revenue income, provide investment opportunities or deliver capital receipts to stimulate development and growth.

- We will challenge the current use of assets and identify underutilised space to maximise commercial activities
- Look to allocate funds to projects that will achieve the maximum positive impact
- We will seek efficiencies in occupation and utilisation
- Identify opportunities for direct investment in existing assets to enhance income
- Identify and create a disposal programme of under-performing assets i.e., low return, non-strategic assets which do not enhance the Council's ability to provide outstanding services or meet wider strategic objectives

Use our land and buildings to support the delivery of new homes, encourage development and growth, supporting local business needs and encouraging new business to Torbay.

- Work with TDA to use our estate to stimulate and support regeneration and inward investment
- Work to identify suitable sites that will help deliver sustainable, affordable, and suitable housing
- Continue to utilise the Growth Fund for investment to create local employment and training opportunities
- Manage the Council's Investment Portfolio and Let Estate effectively, balancing regeneration needs, job creation and income generation
- Continue to access funding opportunities to promote and encourage the improvement in the physical environment of our three town centres

Develop a robust asset management plan to invest properly in all corporate assets, to ensure they are fit for the future in supporting excellent service delivery.

- Challenge the cost of property activities to drive performance
- Work with Climate Emergency Officers to ensure our properties are as sustainable as possible in their design, construction, operation and maintenance and aligned to meeting the carbon neutral target
- Reduce energy and water consumption and reduce carbon emissions wherever possible

- Undertake a whole building life cycle costing exercise for each corporate asset to understand the maintenance of a property over its lifetime to understand the long-term costs of projects not just the initial capital costs
- Look to reduce the back log maintenance of the corporate estate with targeting of funds against the highest priorities
- Review asset related feasibility and options appraisals across all service departments once their business models/plans are finalised.

To work collaboratively and promote joint working between Torbay Council, Brixham Town Council, Health and blue light authorities and other Voluntary, Community and Faith Sector organisations to identify wider opportunities to benefit the community within the context of asset strategy and planning.

- Work with other agencies to promote co-location and joint service delivery.
- Work to support the ongoing integration of health and social care.
- Continue partnership working through the government's One Public Estate programme, to explore options for improved service delivery for public sector bodies in Torbay and across South Devon.
- Encourage the use of assets by the Voluntary, Community and Faith Sectors through Community Asset Transfer opportunities.

Where appropriate the Council will adopt and embed the Corporate Landlord model to drive asset related decision making. Based on prepared service property strategies for the coming 3-5 years, decisions will be made on the viability and feasibility of sites guided by the above principles, and using the process and criteria set out in the Asset Management Policy 2022 - 27.

## Conclusion and Our Forward Plan

This document covers one element of the new Asset Management Framework - (1) the **Asset Management Strategy** 2022 -27 and should be read alongside (2) the Asset Management Policy 2022 - 27. Together these make up the Strategic Asset Management Framework. The Strategic Asset Management Framework outlines the key strategic objectives for Torbay Council's land and buildings over the next five years.

Sitting outside of the framework will be the Asset Management Operational Delivery Plan which further describes the specific activities to achieve the objectives of the Asset Management Policy 2022 ~ 2027. The Operational Delivery Plan will be categorised under two thematic headings of Strategic and Operational Actions.

The Operational Delivery Plan will be populated and approved by Torbay Council's Director of Place. The Operational Delivery Plan will be reviewed and monitored regularly by the relevant Portfolio Holder and Cabinet where necessary. It will continually change to reflect achievements of actions and capture new priorities and initiatives as they are identified. Consequently, the Operational Delivery Plan will not be a policy document.

It is intended that Torbay Council's Asset Management Framework will define the principles, criteria and processes through which decisions will be made regarding the use of Council assets.

# Asset Management Policy

## 2022 - 2027

# Asset Management Policy 2022 - 2027

The Torbay Council Strategic Asset Management Plan sets out the Council's approach to the strategic management of its assets, how it will support service delivery, provide the Council with income and how it will fulfil its mission to support, enable and empower its residents, our communities, and our partnerships, promote growth and place shaping within Torbay and deliver Torbay Community and Corporate Plan 2019- 2023 One Torbay: Working for all.

To support this Torbay Council will adopt a new Asset Management Framework which comprises of two separate elements:

- An Asset Management Strategy 2022 - 2027
- **An Asset Management Policy 2022 - 2027**

The advantage of adopting such a framework is that many areas relating to the Council's approach to its land and property assets is likely to remain constant for several years. However, by adopting two separate elements will allow for each to be reviewed at different times. The Asset Management Strategy 2022 – 2027 will establish clear principles by which the Council will manage its land and buildings. It will remain in place for the next 5 years but can be reviewed more frequently to ensure it is still relevant to what it is trying to achieve. The Asset Management Strategy will be approved by Full Council.

The **Asset Management Policy 2022 - 2027** provides an overview of the Council's Land and property estate, together with the main priorities for managing and developing that estate over the next five years. The Policy will set out how the Council will implement the identified principles as described in the Strategy. The Policy will be reviewed and amended, on a three yearly cycle to ensure the estate fully supports the Torbay Council Community and Corporate Plan 2019- 2023, by contributing to the key objectives for property asset management. The Asset Management Policy will be approved by Cabinet.

Sitting outside of the framework will be an Asset Management Operational Delivery Plan which further describes the specific activities to achieve the objectives of the Asset Management Policy 2022 ~ 2027. The Operational Delivery Plan will be categorised under two thematic headings of Strategic and Operational Actions.

The Operational Delivery Plan will be populated and approved by Torbay Council's Director of Place. The Operational Delivery Plan will be reviewed and monitored regularly by the relevant Portfolio Holder and Cabinet where necessary. It will continually change to reflect achievements of actions and capture new priorities and initiatives as they are identified. Consequently, the Operational Delivery Plan will not be a policy document.

It is intended that Torbay Council's Strategic Asset Management Framework will define the principles, criteria and processes through which decisions will be made regarding the use of Council assets.

The adoption of the Asset Management Strategy 2022 - 2027 and Asset Management Policy 2022 - 2027 will supersede the Corporate Asset Management Plan (2015-2019).

## Asset Management Policy

The Asset Management Policy 2022 – 2027 provides an overview of the Council's Land and property estate, together with the main priorities for managing and developing that estate over the next five years.

The Policy will be reviewed on a 3 yearly cycle to ensure the estate fully supports the Torbay Council Community and Corporate Plan 2019- 2023, by contributing to the key objectives for property asset management.



## Land & Buildings

Torbay Council's property portfolio comprises of over 1,800 land and building assets, with a total gross book value of £468million, as of 31<sup>st</sup> March 2021. The total annual rental income generated from the estate is c. £17.3m, with a further c.£3m pa generated through service area concessions, fees, and charges. There are a wide range of assets within the corporate estate, which includes the Council's investment portfolio, offices, car parks, depots, schools, and assets leased to community organisations. The book value is not necessarily the exact amount that could be realised if all the assets were sold, but it does demonstrate the extent of the Council's land and buildings and why they need to be carefully managed.

The assets help deliver a mixture of front-line services and indirect service provision. Many of the assets are legacies from donations, local government reorganisations and previous acquisitions. The Council has undertaken a significant rationalisation exercise of its estate over the last 10 years resulting in the size of the operational estate particularly being reduced. However, the ongoing careful management and continuous review of assets is imperative to avoid the possibility of money being wasted by retaining assets that are past their useful life. Equally, an asset beyond its useful life will still retain a value, whether this is financial or social. Consequently, if these assets are surplus, the Council should look to dispose and release the value so the capital can be re-invested elsewhere.

Following the COVID-19 pandemic, there will be changes to the way the Council works and some services will inevitably be delivered differently. As a result, some properties will need to change as we move forward over the next 3 to 5 years. We may need to invest further in our existing buildings or provide some new buildings to deliver services that are fit for a new way of working. The Council equally needs to consider measures to be taken in relation to minimising energy and water use to meet its carbon neutral 2030 targets.

To assist in this process the Council will, where appropriate, adopt the Corporate Landlord model. This will maximise value for money and make the most efficient use of our property assets, ensuring capital works, both reactive and planned

with particular attention to backlog maintenance which at the 31<sup>st</sup> March 2021 was c.£23.6m is prioritised appropriately. We will obtain up to date condition data and align this information with operational priorities.

## Back Log Maintenance

Torbay Council has a significant and serious issue regarding the disrepair of assets in common with many other local authorities. As at the 31<sup>st</sup> March 2021 backlog repairs totals £23.6 million (excluding schools and leased out assets where Torbay Council have no responsibility for repairs and maintenance) have currently been identified of which almost £8.3 million (excluding schools and leased out assets where Torbay Council have no responsibility for repairs and maintenance) are categorised as Priority 1 & 2. The backlog will not be eradicated without additional funding and resources.

Priority 1. Urgent work that will prevent immediate closure of premises and/or address an immediate high risk to the health and safety of occupants and/or remedy a serious breach of legislation.

Priority 2. Essential work required within two years that will prevent serious deterioration of the fabric or services and/or address a medium risk to the health and safety of the occupants and/or remedy a less serious breach of legislation.

We will also adopt an Asset Challenge process which ensures a robust approach is undertaken providing confidence that any decision regarding future use of a property provides the best and most appropriate output.

This Asset Management Policy will ensure that each asset is categorised, by property type, into one of seven asset groups. The reasons for holding these assets will vary and as a result, we may need to measure performance in different ways. Nevertheless, the performance of each asset and each group must therefore be linked to the strategic purpose for holding it.

Set out below is the definition for each of the asset groups:

### Community Assets

Community assets are those land and buildings the Council intends to hold in perpetuity which can promote social inclusion and improve the health and well-being of citizens. This includes public open spaces, memorials, parks, shelters,

sports pitches and public toilets. The assets which are often legacies from donations, will have no determinable useful life and which may, in addition, have restrictions on their disposal. This group of assets is nevertheless a significant proportion of the asset base with 670 assets and a gross book value of £9.7m. There is a significant ongoing maintenance liability with community assets.

### Heritage Assets

Heritage assets are those assets that are intended to be preserved in trust for future generations because of their cultural, environmental, or historical associations/significance. The Council has 43 heritage assets, including for example Torre Abbey and Torquay Pavilion which are held by the Council in pursuit of its overall objectives in relation to the maintenance of our heritage and culture.

Heritage assets can include historical buildings, archaeological sites, military and scientific equipment of historical importance, historic motor vehicles, civic regalia, orders, and decorations (medals), museum and gallery collections and works of art. This asset schedule has a gross book value of £26.2m.

### Infrastructure Assets

Infrastructure assets are long lasting tangible assets that add value and are an integral part of land and buildings. These assets tend to be part of a larger component or system for example linked to transport, communication, water, sewage, bridges, and sea defences and need to be maintained to ensure functionality in the delivery of effective and efficient delivery of services. A significant proportion of the 102 infrastructure assets relate to the harbour estate. The gross book value of this schedule is £39.8m.

## Investment Assets

Investment assets are those assets held by the Council solely for the purpose to earn rental income or for capital appreciation or both. The Council's investment portfolio is divided into two groups of assets.

**Portfolio A** – is the schedule of 20 investment assets that have been purchased via the Investment Fund since 2018. These assets have been purchased through borrowing from the Public Works Loan Board. Any future disposal of Portfolio A assets will be subject to the criteria as defined within the borrowing agreements.

Portfolio A	Total Gross Book Value 31/3/2021 = £197.8m	Rental Income at 31/3/2021 Per Annum
Hotel	1	£313,000
Industrial	5	£5,213,000
Leisure	1	£591,000
Office	4	£3,638,000
Retail	9	£2,628,000
<b>TOTAL</b>	<b>20</b>	<b>£12,383,000</b>

**Portfolio B** – is a schedule of assets where the rental income for each asset exceeds £20,000 pa and formed part of the Council's original let estate, prior to 2018. This schedule comprises of 24 assets with a gross book value of £32.5m. The assets comprise a range of property types including for example a golf course, caravan site, leisure facilities, restaurants, and cafes. As at the 31<sup>st</sup> March 2021 they produce an annual rental income of £2,322,000.

Investment assets are primarily to be retained in the long term. However, the benefit of selling the assets will be regularly reviewed by Director of Place in consultation with the TDA for potential disposal at which point any outstanding debt will be repaid. The review will always be considered alongside the resulting impact on the Council's revenue budget and any impact of operational delivery from the lost income stream and any costs of disposal.

## Leased Estate, other Land & Buildings

The Leased Estate includes those remaining assets that generate an income but are not captured in the Investment portfolios and totals c.890 assets with a gross book value of £154m. These assets have in the past been used to perform functions / services directly by the Authority but are now let to third parties to perform for example, beach / park cafes. Other land and buildings include a plethora of other leases and licences, such as small pieces of fringe and highway verge land, substation sites and other low value assets. The rental income is nevertheless substantial equating to £4.6m pa.

## Operational Assets

Operational assets are those assets used to deliver front line services and the daily operation of the business for Torbay Council. This comprises of 20 assets with a gross book value of £5.3m and includes corporate office accommodation and service buildings. (Operational assets used to deliver the Council's harbour authority function are included in the Infrastructure Assets group).

## Surplus Assets

Surplus assets are those assets that have been declared surplus to the Council's operational requirements. Often the assets are close to or beyond useful economic life. These assets should be open for disposal or consideration for a community asset transfer.

TDA will produce an annual Estate Dashboard recording the overall performance of the property portfolio:

[Torbay Council Estates Dashboard – 31<sup>st</sup> March 2021](#)



## Council Finances

Torbay Council like many other Councils has experienced significant funding reductions over the last 5 years. Torbay Council has seen a reduction in its Revenue Support Grant from £27m in 2015/16 to £6m by 2019/20. It is still uncertain what the Council's funding will be in future years. Despite these financial challenges Torbay Council is committed to supporting growth and investment through its Capital Programme and will look to intervene where the market is failing. The Council continues to deliver its Investment and Regeneration Strategy, which is generating revenue income, as well as enhancing, and supporting the economic performance of Torbay.

The Council has a range of capital resources at its disposal, which it uses to deliver services and to achieve its strategic objectives. The Council's ability to maintain these assets and to enhance their role in the delivery of services is crucial to its financial resilience. If assets fall into disrepair, they are no longer able to fulfil their primary purpose, then the Council's ability to deliver the associated services is impaired and it has resources tied up in assets that it cannot use. Consequently, planning and managing the use of the Council's capital resources is vital.

The Council adopts a range of policy documents in providing a long/medium term plan. The Asset Management Strategy 2022 – 2027 and Asset Management Policy 2022 – 2026 needs to be consistent with the plans and strategies identified by the Council which includes:

- The Medium-Term Financial Plan
- The Capital Plan & Strategy
- The Annual Revenue Budget
- The Treasury Management Strategy
- The Investment and Regeneration Fund Strategy

Inevitably the full picture of the control system around the Council's wide range of capital expenditure and its funding is reflected in these documents, which includes monitoring and management arrangements.

The Council's assets must also be worked harder to be able to contribute to the overall corporate and service objectives for example, the proposal to redevelop the old toilet blocks at Preston and Corbyn Head, the Old Toll House, Torquay and the Terrace/Harbour Car Park, Torquay.

Current and recently completed Capital Projects include:

- **Fleet Walk Shopping Centre, Torquay** – Using its Economic Growth Fund, Torbay Council purchased this asset in November 2019, as part of its plans to regenerate Torbay's town centres.



- **EPIC White Rock, Paignton** – An £8m Electronics and Photonics Innovation Centre (EPIC) opened in summer 2019 supporting tech innovation and promoting collaborative activities in an excellence cluster between businesses and research institutions. This building has now been leased on a long leasehold basis to TDA. The asset is currently 65% let and ahead of TDA business plan for the centre.



- **Harbour Light Redevelopment, Paignton Harbour** – A new bar and dining venue overlooking Paignton Harbour, opened in February 2020 after St Austell Brewery's investment. The project was a product of the Council's Port Masterplan and promoted by the Tor Bay Harbour Committee.



- **Oxen Cove Jetty, Brixham** - A £2.5m project jointly funded by Torbay Council and the European Maritime Fisheries Fund to provide additional landing capacity to support the fishing industry by easing demand at peak time and streamlining the logistics of distribution at Brixham Fish Market.



## Asset Challenge

Due to the ongoing financial challenges facing the Authority and the further future reductions in Revenue Support Grants (RSG), unless there is specific approval at Full Council to the contrary, the Council will always seek to maximise revenue streams and the full market receipt whether by way of freehold disposal or leasehold interest from assets classified as Investments, Leased Estate, other Land & Buildings. Disposal of other asset groups whether by way of freehold disposal or leasehold interest will be considered alongside community aspirations and due regard will be given to the purpose of ownership, including the operation of Council services.

It is intended that all assets that are assessed as surplus and / or not required for operational purposes should be reviewed through the Asset Challenge process. This provides confidence that any decision regarding future use of a property provides the best and most appropriate output. It should be noted that best value in terms of a capital receipt is not always the right outcome, and the Council needs a mix of revenue, capital and place shaping outputs.

The process of decision making on future asset usage, project delivery and the disposal of sites shall be determined in two parts:

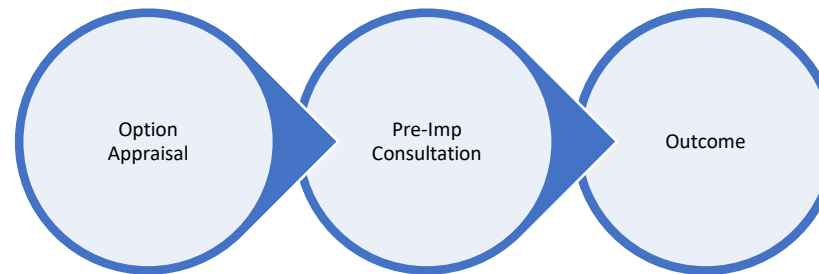
### Part 1 – the Corporate Assessment:



1. **Strategic Purpose** - This part of the process determines whether an asset has an identified use and purpose which enables service delivery in line with corporate and service strategies. For example, where there is an identified need within a specified location by multiple services, these are co-located within a multi-functional hub therefore enabling asset consolidation and reduction in running costs. Additionally, this could be identifying assets which could support service delivery, for example, extra-care sheltered housing that reduces expenditure on high-cost care, but also delivers important outcomes to residents.
2. **Opportunities and Risk** – The second part of this assessment is understanding if there are any opportunities that could be exploited. Do we fully understand the cost and condition of a building or asset; is this a low performing/high-cost asset in poor condition that is not fit for purpose, and requires significant investment? If so, it may not be an asset to retain.
3. **Performance Appraisal** - The Council also needs to understand what financial and non-financial outcomes are being delivered and can they be quantified. Understanding the management costs are equally important. Assets may be retained where there is a clearly defined, future strategic purpose, which has a value and can be delivered within an agreed timeframe. Cost/benefit analysis of investment, to make the asset fit for purpose, with an appropriate payback period, relevant to length of future use.

The Asset Challenge process sets out the stages of this assessment, and what happens in each case. If the asset is not suitable or not needed for either purpose, it moves to Part 2.

## Part 2 – the Option Appraisal:



4. **Option Appraisal** - This part of the process focusses on the use of the asset beyond service or operational requirements. This is a balance of performance, opportunities and risks. This might include a site that could be disposed of for a capital receipt; redeveloped for revenue income generation or held for future strategic use to maximise output or benefit. The primary process is a formal options appraisal which considers potential future uses of the site. The options appraisal will identify the preferred option and how this best aligns with the Council's Community and Corporate Plan.
5. **Pre – Implementation Consultation** - Partnership working and shared development where opportunities will deliver quantifiable benefits. There will be a need to engage with both internal and external stakeholders and partners. A key factor is whether an asset supports economic growth and improves on the 'place'.
6. **Outcome** - The outcome of the assessment will decide whether an asset is retained, remodelled & re-used or disposed through the open market or by way of a community asset transfer.

## Future Ways of Working

Future Ways of Working is the Council's forward-looking programme, forming part of the overarching transformation programme, building on the work of the previous Office Rationalisation Programme. Fundamental to the success of the programme is not making snap decisions about individual assets, without a holistic view being taken. An example of this would be the future of Paignton Library, the Council's only forward-facing asset in Paignton.

The outbreak of the Coronavirus - COVID 19 demonstrated the resilience introduced throughout the Council's workforce with the transition of hundreds of employees to home working for a sustained period. Enabled by a conscious shift to align roles to workstyles that allow a high degree of agility, supported by ICT equipment and infrastructure and relevant policies and procedures to support a new way of working.

The key drivers for the new programme will be developed in greater detail over the next 12 months. The programme will enable more efficient home and team-working, working more flexibly within our buildings and homes, through promotion of agile working, and providing modern fit-for-purpose workplaces, supplemented with the correct tools for greater home-based working, where appropriate. Closing or repurposing buildings and space within those buildings will naturally follow as we build up intelligence of our future needs.

- Addressing the essential maintenance needs of our remaining buildings, with particular attention to backlog maintenance, ensuring sufficient resources are in place to maintain the portfolio including mechanical and electrical (M&E) systems and prolonging their operational lifespan, addressing critical structural issues.
- Complying with regulations - ensuring that actions are taken to ensure that buildings are compliant with statutory obligations for example in respect of Fire, Legionella and Asbestos.
- Optimising income - protecting existing income streams from assets and investing in buildings where additional income can be generated.
- Using less energy - improving energy efficiency in our offices and other buildings and reducing running costs.

- One Public Estate - county wide collaboration on asset management to enable Public Sector providers to collaborate on strategic planning and management of their land and buildings as a collective resource.
- Serving our customers more efficiently - focusing on what our customers want and need, using better accessible and inclusive facilities to serve them.



## Climate Change: De-carbonisation

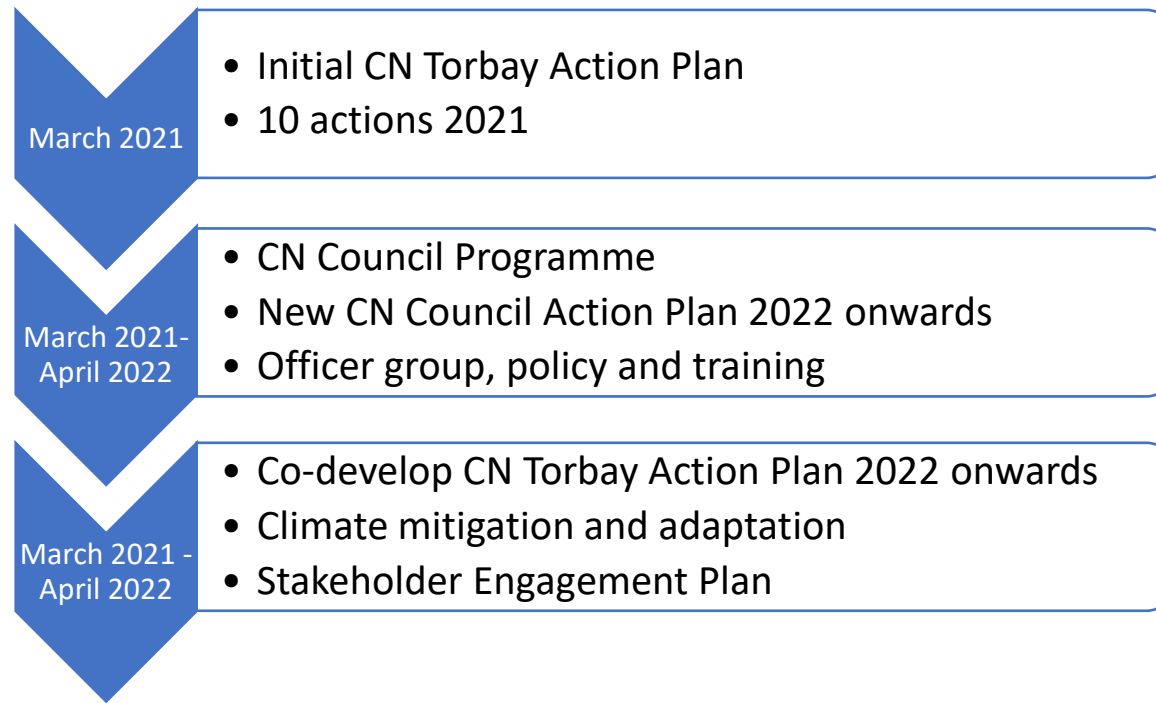
In May 2019, the UK Parliament declared an Environment and Climate Emergency, and the government amended the 2008 Climate Change Act to strengthen its climate ambition, legislating for a target to reduce the UK's emissions to Net Zero by 2050. Like many local authorities, Torbay Council recognised the scale and urgency of the situation by declaring a Climate Emergency of its own, in June 2019, and by joining the Devon Climate Emergency Response Group. This group is made up of Devon's councils, emergency services and leading business groups. Working towards the Devon Carbon Plan, Torbay Council set out its clear objective to become a Carbon Neutral Council by 2030 and work with others to create a carbon neutral community. Other measures adopted by the Council to address climate change include:

- Increase recycling rates.
- Reduce Torbay's carbon footprint.
- Encourage a sustainably developed built environment.
- Implement re-wooding and rewilding.
- Address flooding risks.
- Improve communications and transport connectivity and sustainability.
- Granting of 'green' leases.

To achieve carbon neutrality within Torbay Council's own estate requires significant resource and effort.

The Council has committed to developing its own carbon neutral action plan by April 2022. As part of this we will work with TDA to ensure a roadmap with actions on how we intend to work towards a carbon neutrality by 2030.

The Council will also develop with partners a Torbay wide carbon neutral plan and refresh the Energy and Climate Change Strategy (2014 – 2019) by April 2022.



Torbay Council will work in reducing our environment impacts and become carbon neutral by 2030 by adhering to the following principles:

- Reduce energy & carbon emissions by the adoption of energy efficient measures, renewable energy tariffs and staff behavioural initiatives.
- Minimise waste and water consumption through waste reduction, reuse, and recycling.
- Use sustainable resources through the things we purchase and the services we commission.
- Enhance our natural environment by protecting the Council's own estate through a range of conservation practices.
- Climate resilience and the better understanding of the near-term and future risks on climate change for the Council's operations and services.
- Improve communications and transport connectivity and sustainability.
- Granting of 'green' leases.



## Maintaining Our Assets & Corporate Landlord Approach

The way Torbay Council manages its assets is important. We need to ensure that, where appropriate, our land and buildings are managed as a centralised corporate resource, the right stakeholders are involved, and decisions are made in the context of the Council's priorities and objectives.

The concept of a Corporate Landlord Approach is that the ownership of an asset and the responsibility for its management and maintenance is transferred from service areas into a corporate centre. The service area then becomes a corporate tenant and their priority is to plan and deliver their service to the best of their ability. The Corporate Landlord's function is to ensure all services are adequately accommodated and to maintain and manage the associated land and property assets.

Although a Corporate Landlord 'lite' approach has been adopted this has only been completed in part. The Corporate Landlord's responsibility should extend further than the acquisition, development and disposal of land and buildings. Over the life of the strategy the Corporate Landlord will be delivered further to assume more responsibility for asset planning, review, feasibility and options appraisal accounting for the needs of most service areas, but more importantly, making decisions based on overall corporate priorities.

The overall asset maintenance strategy should be to ensure that our finite and reducing resources are prioritised to appropriate buildings, where the money is needed most. To identify these priorities a programme of condition surveys will be undertaken to understand maintenance requirements over a rolling period of 5 years. The aspiration should be to complete lifecycle condition surveys on selected assets to cover a period of 25 to 30 years. This will enable a better-informed decision-making approach and maximise efficiencies by planning over a longer time horizon, instead of reacting to maintenance emergencies as they happen.

Moving forward, the four key aims for both Corporate and Schools Building Maintenance should be:

- To ensure our buildings are safe and secure for the people who use them.
- To allocate funding to projects that will achieve the maximum positive impact for those who use them including our customers.
- To achieve an efficient balance between planned and reactive maintenance work.
- Achieving maximum efficiencies in the way we procure building maintenance work.

TDA will deliver the Corporate Landlord Model, as directed by the Council, through the use of the following activities:

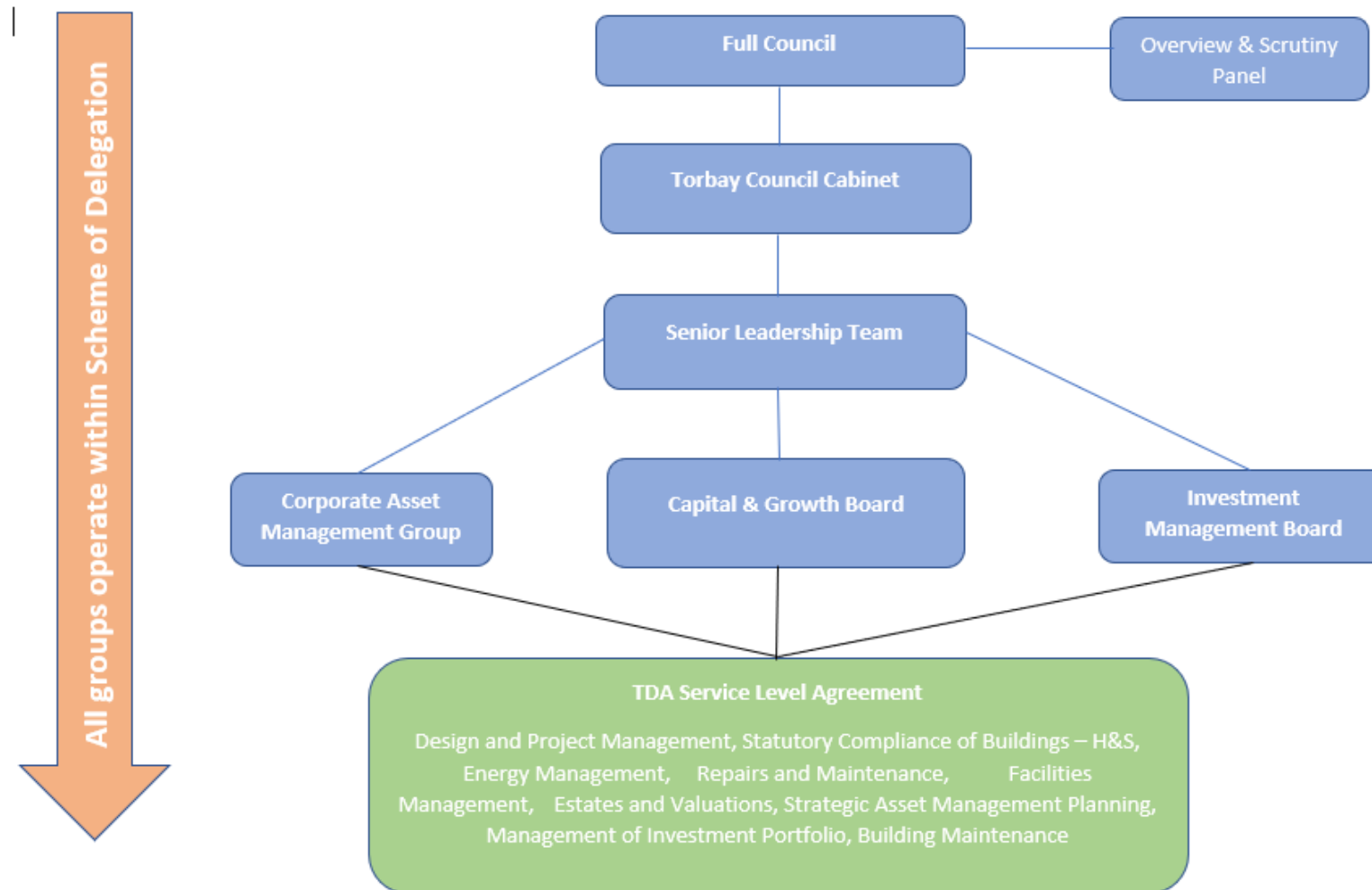
- Design and Project Management
- Statutory Compliance of Buildings – H&S
- Energy Management
- Management of Repairs and Maintenance
- Facilities Management
- Estates and Valuations
- Strategic Asset Management Planning
- Management of Investment Portfolio
- Building Maintenance

Day to day performance and management of the Council's asset portfolio is a commissioned service undertaken by TDA.

The Council shall ensure there is a robust governance structure in place providing direction and transparency of the management of the Council's estate.

The diagram below outlines the organisational structure for the governance of the Council's land and building assets.

## Governance Structure



## Working with Partners

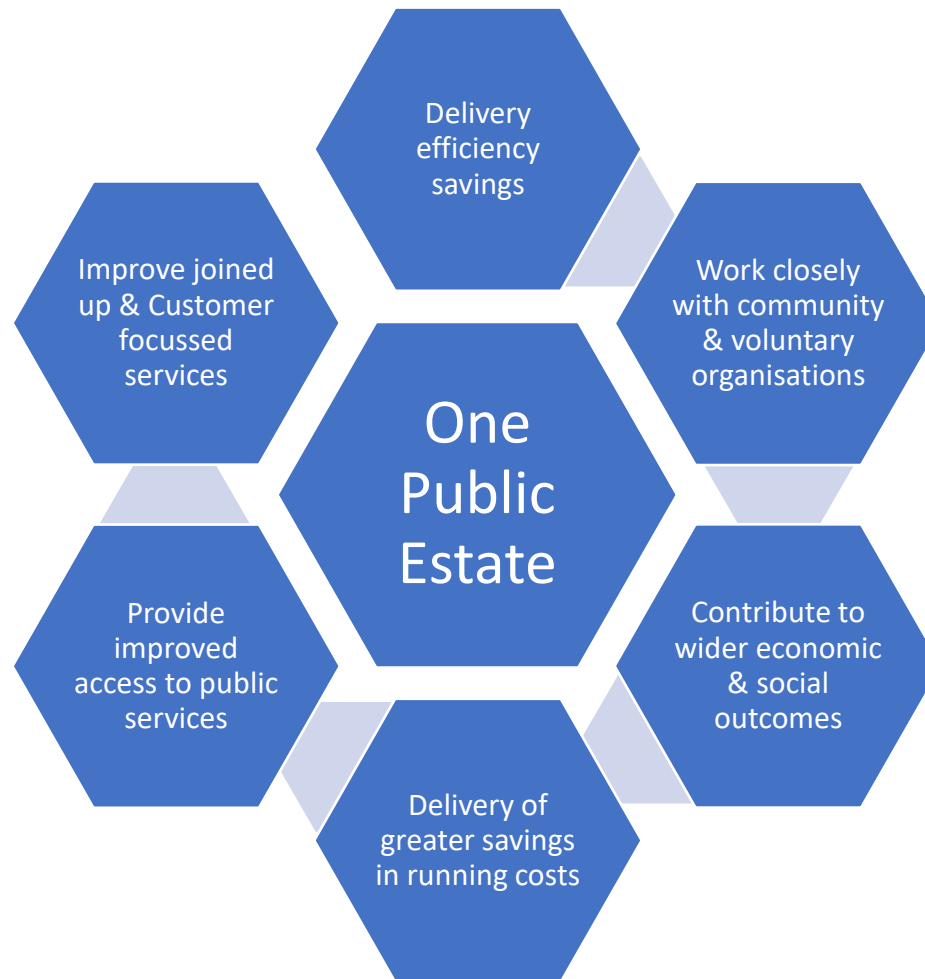
Torbay Council are active members of the One Public Estate (OPE) programme, working closely with other public sector organisations across the sub-region (Devon OPE Board), exploring opportunities to reduce premises costs and make assets work better for our communities and customers. This includes working with Torbay & South Devon NHS Trust through the Integrated Care Organisation delivering community health and adult social care services for Torbay. Other partners for example include Devon and Cornwall Police, South Devon College and Libraries Unlimited.

The key aim being to work with a range of key stakeholders, exploring opportunities for shared services and how our combined assets can support this. We will also continue to be an active member of the Heart of the South West LEP Joint Committee and the Emerging Greater South West proposals.

There are many more opportunities across Torbay to explore asset-based arrangements including shared space and community / public service points which will encompass the needs of our communities.



The strategic objectives of the One Public Estate programme are set out below:





## Engaging with Communities

Torbay Council lease over 44 land and property assets to voluntary, community and sports organisations, often at reduced or minimal rents. Many of these leases have been in place for a number of years. Other leases have been transferred to local organisations who run them successfully for the benefit of our local communities. These arrangements range from short term licences, sports leases for up to 40 years or granted by way of a more formal process under a 'Community Asset Transfer' (CAT).

Local people are often best placed to manage community facilities in their area. They already make excellent use of these assets with local knowledge and hands on management, often resulting in lower overheads and better value for money outcomes. Community organisations can lever in significant funding and are also able to use volunteers to run facilities.

Fundamentally, community groups can take ownership of assets and have great pride in their local area. Managing these facilities can help empower local communities and can bring opportunities for greater independence and financial sustainability. The Council are fully committed to using appropriate assets to form long term partnerships with suitable voluntary, community and sports organisations.

A number of operational Policies are in place that will be followed in relation to applications for Community Asset Transfers and Sports Leases.

[Community Asset Transfer Policy \(Link\)](#)

[Sports Lease Policy \(Link\)](#)

[Grant in Lieu of Market Rent Application \(Link\)](#)



## Conclusion and Our Forward Plan

This document covers one element of the new Asset Management Framework - the (1) Asset Management Strategy 2022 - 2027 and should be read alongside (2) the **Asset Management Policy 2022 - 2027**. Together these make up the Strategic Asset Management Framework. The Strategic Asset Management Framework outlines the key strategic objectives for Torbay Council's land and buildings over the next five years and it will form part of the Council's overall Policy Framework.

Sitting outside of the framework will be the Asset Management Operational Delivery Plan which further describes the specific activities to achieve the objectives of the Asset Management Policy 2022 ~ 2027. The Operational Delivery Plan will be categorised under two thematic headings of Strategic and Operational Actions.

The Operational Delivery Plan will be populated and approved by Torbay Council's Director of Place. The Operational Delivery Plan will be reviewed and monitored regularly by the relevant Portfolio Holder and Cabinet where necessary. It will continually change to reflect achievements of actions and capture new priorities and initiatives as they are identified. Consequently, the Operational Delivery Plan will not be a policy document.

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