

Sustainable Development Select Committee			
Title	Regeneration and Asset Management Division – Asset Management System	Item No.	4
Wards	All		
Contributors	Director of Regeneration and Asset Management		
Class	Part 1	30 th June 2015	

1. Purpose of paper

- 1.1. A demonstration and review of the new Asset Management System for the Council's non-housing portfolio of approximately 800 assets. This forms part of the Sustainable Development Select Committee's work programme for 2015.
- 1.2. This report aims to provide some background, rationale and an update on the development to date of the AMS. It is accompanied by a brief demonstration of the workings of the system.

2. Recommendations

- 2.1. It is recommended that the Select Committee:
 - note the content of this report, which provides background and development to date of the new Asset Management System for the Council's non-housing asset portfolio.

3. Background

- 3.1. The Council has thousands of assets made up of residential and non-residential units. The data on all residential housing units is held by Lewisham Homes on their Academy database system – these number approximately **18,000** assets. The rest, approximately 800 non-residential assets, were until recently held in various forms (mainly Excel spreadsheets) by different services across the Council, on a number of fragmented systems (e.g. Landmaster, K2, etc.).
- 3.2. It is clear that in order for the Council to make good business decisions regarding its assets, it must have accurate data, a fit-for-purpose asset management system and effective support structures, systems and processes in place. The fragmented manner in which this information has previously been held poses risks for the day to day management of the Council's asset portfolio (including health and safety & regulatory risks) and hampers our ability to maximise use of the corporate estate (a requirement that is at the

heart of proposals submitted to the Lewisham Future Board as part of the Asset Rationalisation Programme).

- 3.3. In order to mitigate the risks noted above and to support the division in maximising the use of the estate, it was proposed that a single integrated asset management system (AMS) to consolidate all asset-related information, and which could be used by both the Council and its partners/contractors to proactively maintain and manage our assets, should be developed. Development of a corporate AMS (that is accessible by all services) would embed the system across the organisation and help create effective support structures, systems and processes.
- 3.4. Last year, officers began to develop a tailored system (the R-AMS) to consolidate the existing systems previously used to manage assets (LandMaster), projects (Various Excel & Word Documents), and reactive maintenance (K2). The various elements of this system, and their development to date, are set out below.

4. Modules on the R-AMS system:

4.1. Properties: this module comprises the following functionalities:

- 4.1.1. **Lease Management.** This allows the management of actual and historic property tenants (mostly commercial properties)
- 4.1.2. **Transaction proformas.** This functionality drives the lease record management (allowing communication between Corporate Asset Services, Legal Services, and Finance Services)
- 4.1.3. **Service and Division Dashboard.** Allows the Service manager and Division manager to approve or reject Transaction Proformas
- 4.1.4. **Document Management.** Allows storage of property-related documents against UPRN named folders
- 4.1.5. **Map Preview (UPRN linked) to Rapid Address Finder Property Map.** Allows the linking of map generated by “Cadline” identifying the property (with boundaries) within the LLPG and the R-AMS
- 4.1.6. **Energy Management.** Allows storing of multiple records of EPC against a property

4.2. Projects & Programmes: this covers all Programme Management and Project Management functionality.

- 4.2.1. **Project Management:** Provides Project Managers and their teams with functionalities including time management, budget management and document management through the Project site
- 4.2.2. **Project Site:** SharePoint site created for each “live” project, allowing management of libraries, tasks, Gantt charts, permissions, and document sharing.
- 4.2.3. **Risk management:** Categorised and identified per project

- 4.2.4. **Project Highlight Reports (PHRs):** Reports created by the project manager allowing Project Review Groups to obtain information and analyse the evolution of each project
- 4.2.5. **SRO Dashboard (PHR Approval):** Allows Senior Responsible Officers (SROs) to review, approve or reject the PHR.

4.3. Reactive Maintenance

- 4.3.1. **Contractor Management:** Allows management of contractors' and sub-contractors' records
- 4.3.2. **Call Management:** Allows LBL Contractor's Helpdesk to log calls against operational buildings managed by the Council
- 4.3.3. **Quotations and Fees:** Allows LBL Contractor's Helpdesk to generate quotations (and fees) allowing call expenses approval by the LBL FM Team members
- 4.3.4. **Purchase Order:** Allows LBL Contractors to generate purchase orders for their sub-contractors
- 4.3.5. **Invoicing:** Allows LBL Contractors to record sub-contractors invoices and recharge to the Council
- 4.3.6. **Fault Type Management:** Fault category, fault elements and fault sub elements linked to provide a set of parameters for each call such as reaction time, call priority and call history filters

4.4. Planned Maintenance

- 4.4.1. **SFG20 Tasks:** These have been implemented on the R-AMS to enable full management of SFG20 schedules for each LBL asset
- 4.4.2. **Asset Management:** Recording and management of assets identified with individual LBL Cornerstone ID Stickers (over 10,000 assets across the Borough)
- 4.4.3. **Ticket Generator:** Report generator allowing creation of "ticket" based on a property/SFG20 Schedule/Asset

4.5. Workplans *(Full functionality on hold due to duplication with PES system)*

- 4.5.1. **Task Management**
- 4.5.2. **Team Member Management:**

5. Development to date

5.1. Development of each of the modules on the R-AMS system is set out below:

	Status	Need more development?	Need System / Process Support?	Need Team support?	Linked to other services?	Need to provide team training
Lease management	Live	No	Yes	Yes	No	Yes
Transaction Proformas	Live	No	Yes	Yes	Yes	Yes
Service and Division Dashboard	Live	No	Yes	Yes	Yes	Yes
Document management	Live	Yes	Yes	No	Yes	No
Map preview	Live	No	No	No	Yes	No
Energy management	Inactive	Yes	Yes	Yes	Yes	Yes
Project management	Live	No	Yes	Yes	Yes	Yes
Project site	Live	Yes	Yes	Yes	Yes	Yes
Risk registers	Live	Yes	Yes	Yes	Yes	Yes
Project Highlight reports	Live	No	Yes	Yes	Yes	Yes
SRO Dashboard (PHR approval)	Live	No	Yes	Yes	Yes	Yes
Contractor management	Live	No	Yes	Yes	No	Yes
Call management	Live	No	Yes	Yes	No	Yes
Quotations and Fees	Live	No	Yes	Yes	No	Yes
Purchase orders	Live	No	Yes	Yes	No	Yes
Invoicing	Live	No	Yes	Yes	No	Yes
Fault type management	Live	Yes	Yes	No	No	No
SFG20 Tasks	Live	No	Yes	No	No	No
Asset Management	Live	Yes	Yes	No	No	No
Ticket generator	Live	Yes	Yes	Yes	No	Yes
Task management	Inactive	Yes	No	Yes	Yes	Yes
Team member management	Inactive	Yes	No	Yes	Yes	Yes

6. Next Steps

- 6.1. The next stage in the development of the R-AMS in addition to the above will be to extend use of the system to other teams and departments within the Authority, as follows:

	Actual Users	Teams to incorporate
Lease management	Corporate Asset Services / Finance / Legal	CYP / Community Services / Housing
Transaction Proformas	Corporate Asset Services / Finance / Legal	CYP / Community Services / Housing
Service and Division Dashboard	Corporate Asset Services / R&AM Management	CYP / Community Services / Housing
Document management	Corporate Asset Services	CYP / Community Services / Housing
Map preview	All Council	
Energy management	Corporate Asset Services	CYP / Community Services / Housing
Project management	CAS / CYP / Community Services / Housing	
Project site	CAS / CYP / Community Services / Housing	
Risk registers	Corporate Asset Services	CYP / Community Services / Housing
Project Highlight reports	Corporate Asset Services	CYP / Community Services / Housing
SRO Dashboard (PHR approval)	Corporate Asset Services / R&AM Management	CYP / Community Services / Housing
Contractor management	Corporate Asset Services / Interserve	CYP / Community Services / Housing
Call management	Corporate Asset Services / Interserve	CYP / Community Services / Housing
Quotations and Fees	Corporate Asset Services / Interserve	CYP / Community Services / Housing
Purchase orders	Corporate Asset Services / Interserve	CYP / Community Services / Housing
Invoicing	Corporate Asset Services / Interserve / Finance	CYP / Community Services / Housing
Fault type management	Corporate Asset Services / Interserve	CYP / Community Services / Housing
SFG20 Tasks	Corporate Asset Services / Interserve	CYP / Community Services / Housing
Asset Management	Corporate Asset Services / Interserve	CYP / Community Services / Housing

Ticket generator	Corporate Asset Services / Interserve	CYP / Community Services / Housing
Task management	Corporate Asset Services	CYP / Community Services / Housing
Team member management	Corporate Asset Services	CYP / Community Services / Housing

- 6.2. As part of this broader, ‘corporatisation’ of the system, Officers are putting measures in place to ensure that sufficient web/technical capacity is provided, and appropriate roles and responsibilities (e.g. Administrators, ‘Super-Users’ and Developers) are allocated to support the system.
- 6.3. A number of the modules also need some further technical development, in order to realise their full functionality. This is set out in the table included in Paragraph 5.1 above.

7. Risks

- 7.1. The key risks to successful implementation of the system – and relevant mitigations measures – are set out below:

Risk	Mitigation
Insufficient technical capacity/integration	Work currently underway with IM&T to ensure that requirements are met, and that R-AMS integrates with existing platforms and other systems
Insufficient knowledge/expertise within LBL to ensure successful operation and maintenance of R-AMS	Extensive roll-out of Administrator /Super-User/Developer roles currently underway, to support users and deliver relevant training programme

8. Implications

- 8.1 There are no specific financial, legal, environmental or equalities implications arising per se from this report.

If there are any queries on this report please contact Kplom Lotsu, Asset Strategy & Development, 020 8314 9283