



**APSE Presentation
5 March 2013**

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South Lanarkshire Council**

**TOPIC: Stock Surveys identifying and
managing the most resource hungry
properties and links to the budget
cycle**

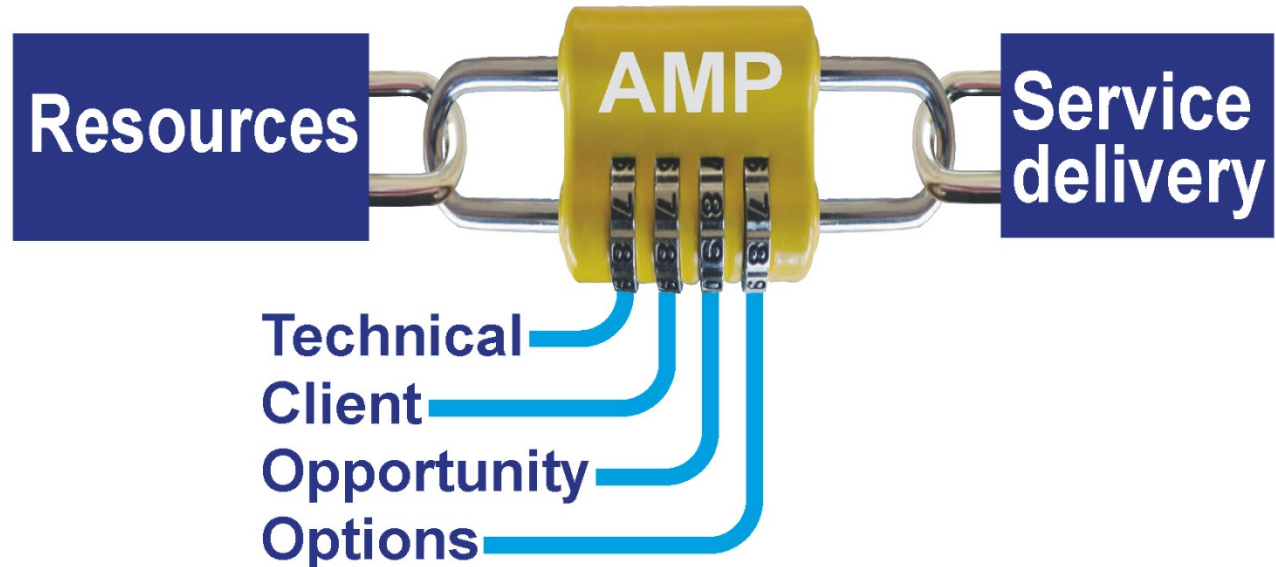
Overview

- **South Lanarkshire Experience**
 - Tools and Techniques
- **Developments to Survey Reporting**
 - Simplifying the Model
- **Total Portfolio Corporate Approach**
- **Aspirations from the Presentation**
 - Promote Discussion
 - Share Best Practice

Overview

Asset Management

Unlocking value through evaluation



General Services Properties

- **500 Plus Establishments**
- **750,000 sq m floor space**
- **Traditional Approach To Surveys**
 - 50 Page Report
 - High Level of Technical Detail
 - Separate Reports e.g. Services
 - Expensive and Time Consuming
 - Difficult to Understand
 - Barrier to Good Asset Management

Front Page



Asset evaluation paper



Property: Biggar Municipal Hall

Address: 7 Kirkstyle, Biggar, ML12 6DT

Constructed: 1910 and 1990

SLPN: 002102

Date: October 2011

Floor area: 601m²

Core facts previous: Sufficiency **A** Suitability **A2** Energy **C**
Opportunities: Development **C** Marketability **B**



Back Page

Breakdown of Expenditure forecast figures presented in page 2

BCIS Elements	Ref	2013/14		2014/18	Total
		R&M	Investment	Investment	
Substructure	1				
Frame	2A				
Upper floors	2B				
Roof	2C			£36,500	£36,500
Stairs	2D				
External walls	2E		£6,500	£3,280	£9,780
Windows and external doors	2F		£10,500	£16,500	£27,000
Internal walls and partitions	2G				
Internal doors	2H	£1,375		£8,700	£10,075
Wall finishes	3A	£4,975	£21,540	£16,600	£43,115
Floor finishes	3B	£3,700		£13,400	£17,100
Ceiling finishes	3C			£9,650	£9,650
Fittings	4	£5,000		£6,000	£11,000
Sanitary appliances	5A	£200		£8,800	£9,000
Disposal installations	5C		£4,000		£4,000
Water installations	5D				
Heat source	5E			£10,000	£10,000
Space heating and air treatment	5F			£2,500	£2,500
Ventilating systems	5G				
Electrical installations	5H	£1,505			£1,505
Lift and conveyor installations	5J				
Protective installations	5K				
Communications installations	5L				
Site works	6A	£1,800	£2,880	£7,900	£12,580
Drainage	6B				
External services	6C				
Maintenance Totals		£18,555			£18,555
Investment Totals			£45,420	£139,830	£182,250
				Total	£203,805

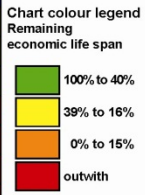
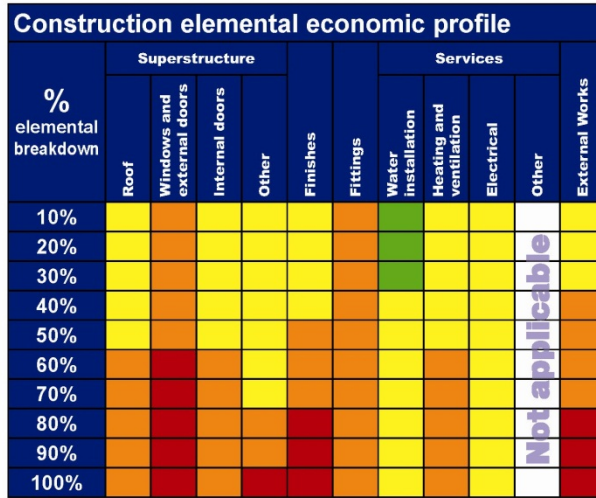
Refer to the Asset Management 5 year property forecast for information on costs

Legislative	2013/14	2014/18	Total
Asbestos			
DDA	£2,400		£2,400
Electrical	£15,000		£15,000
Fire risk	£1,060		£1,060
Water	£1,000		£1,000
Total	£19,460		£19,460

Agreed Recommendations:

That the property is subject to review.

Centre Pages



Economic profile value in £K (£1,000)

	Outwith	£0	£10.5	£0	£10.5	£21.5	£0	£0	£0	£0	£0	£2.9	Totals
last 15%	£36.5	£16.5	£8.7	£12.1	£39.7	£6	£0	£12.5	£0	£0	£7.9	£139.9	
Recommended Investment	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	
Balance												£185.3	

New build comparison value (based on current floor area of 601m2) £0.80 to £1.37 million

Possible CEEF Initiatives:

Automatic meter reader <input type="checkbox"/> yes <input type="checkbox"/> no	Draught proofing <input type="checkbox"/> yes <input type="checkbox"/> no
Voltage optimisation <input type="checkbox"/> yes <input type="checkbox"/> no	Double/secondary glazing <input type="checkbox"/> yes <input type="checkbox"/> no
BEMs/ Control upgrades <input type="checkbox"/> yes <input type="checkbox"/> no	Automatic pool cover <input type="checkbox"/> yes <input type="checkbox"/> no
Air conditioning controls <input type="checkbox"/> yes <input type="checkbox"/> no	Motors and drives <input type="checkbox"/> yes <input type="checkbox"/> no
Lighting conversion <input type="checkbox"/> yes <input type="checkbox"/> no	Solar PV <input type="checkbox"/> yes <input type="checkbox"/> no
Fuel change <input type="checkbox"/> yes <input type="checkbox"/> no	Wind turbine <input type="checkbox"/> yes <input type="checkbox"/> no
Installation of CHP <input type="checkbox"/> yes <input type="checkbox"/> no	Hydro <input type="checkbox"/> yes <input type="checkbox"/> no
Point of use water heaters <input type="checkbox"/> yes <input type="checkbox"/> no	Solar thermal <input type="checkbox"/> yes <input type="checkbox"/> no
Boiler plant upgrade <input type="checkbox"/> yes <input type="checkbox"/> no	Heat pump <input type="checkbox"/> yes <input type="checkbox"/> no
Heat recovery <input type="checkbox"/> yes <input type="checkbox"/> no	Biomass <input type="checkbox"/> yes <input type="checkbox"/> no
Radiator reflective panels <input type="checkbox"/> yes <input type="checkbox"/> no	
Insulation Roof <input type="checkbox"/> yes <input type="checkbox"/> no	Cavity <input type="checkbox"/> yes <input type="checkbox"/> no Pipe <input type="checkbox"/> yes <input type="checkbox"/> no
Other projects _____	

Property aftercare 5 year forecast - Survey Summary Report

Survey overview comments:

1. General
The property was constructed in 1910 and is a Community Hall for South Lanarkshire Leisure and Culture Ltd. The property has been generally well maintained and is in a condition consistent with its age and type. Investment will be required over the next 5 years to ensure continuity of service delivery.

- 2. 5 Year Investment and Maintenance Requirement**
The survey has considered the maintenance required to retain the property for normal service delivery over the next 5 years. The following work with an estimated budget cost of £????? is detailed overleaf
- Replace 50% of roof covering
 - Replace all external windows and doors over 5 year period
 - Major repairs to wall finishes; redecorate
 - Replace vinyl flooring
 - Replace sanitary fittings

NOTE: This building has been marked for review as although services are seen as being in good order (with the exception of boiler plant) the fabric of the building is requiring reasonably significant investment over the next five years.

3. Remaining Economic Life
The remaining economic life of each of the elements has been considered as part of this report. The property is capable of service delivery over the next 5 years without significant investment. Beyond this timeframe, some elements will reach the end of their economic lifespan.

- 4. Legislative**
- 4.1 **Asbestos.** Known asbestos is subject of management regime.
 - 4.2 **Water.** Replacement of fire hoses with portable fighting appliances.
 - 4.3 **DDA.** An updated audit shows the need for suitable seating for disabled users; the provision of a portable induction loop; door call system; additional signage. The total estimated cost is £2,400
 - 4.4 **Electrical.** Renewal of distribution boards, many of which are operating at full capacity.
 - 4.5 **Fire Risk Assessment.** There is a need for fire seals to be inserted in several doors; the gas service pipe requires sealed where it passes through a wall to a fire protected zone; Glass in doors does not appear to meet the required standard. There are management issues with flammable materials in the foyer (a fire protected zone)

5. Services
Replacing two balanced flue gas fired boilers and upgrading of single headed pumps to dual head pumps.

Financial profile

Expenditure forecast	5 year forecast		Total
	2013/14	2014/18	
Summary 5 year forecast	£45,420	£139,830	£185,250
investment			
maintenance requirement	£18,555		£18,555
Legislative / recommended			£19,460
Standard project fees etc			£61,142
Total			£284,407

Recommendation:
5 year investment profile expenditure is considered: prudent review inappropriate
If inappropriate: local re-provision considerations construction issues
 asset management considerations other: Long term service review

Clients perspective:

Requirement for option appraisal yes no
Anticipated retention period: less than 5 years 5 to 10 years 10 years plus unknown
Suitable for continued service delivery: yes no
Are you considering specific improvements etc. yes no
5 year expenditure forecast to be taken forward for project evaluation and tendering . yes no

Advantages

- **Cheaper, Quicker to Provide**
- **Clear Easy to Understand Information**
- **All Elements on Single Report**
- **Improves Client/Member Knowledge**
- **Client Perspective Included**
- **Improves Decision Making**
- **Better Targeted Investment**

Advantages

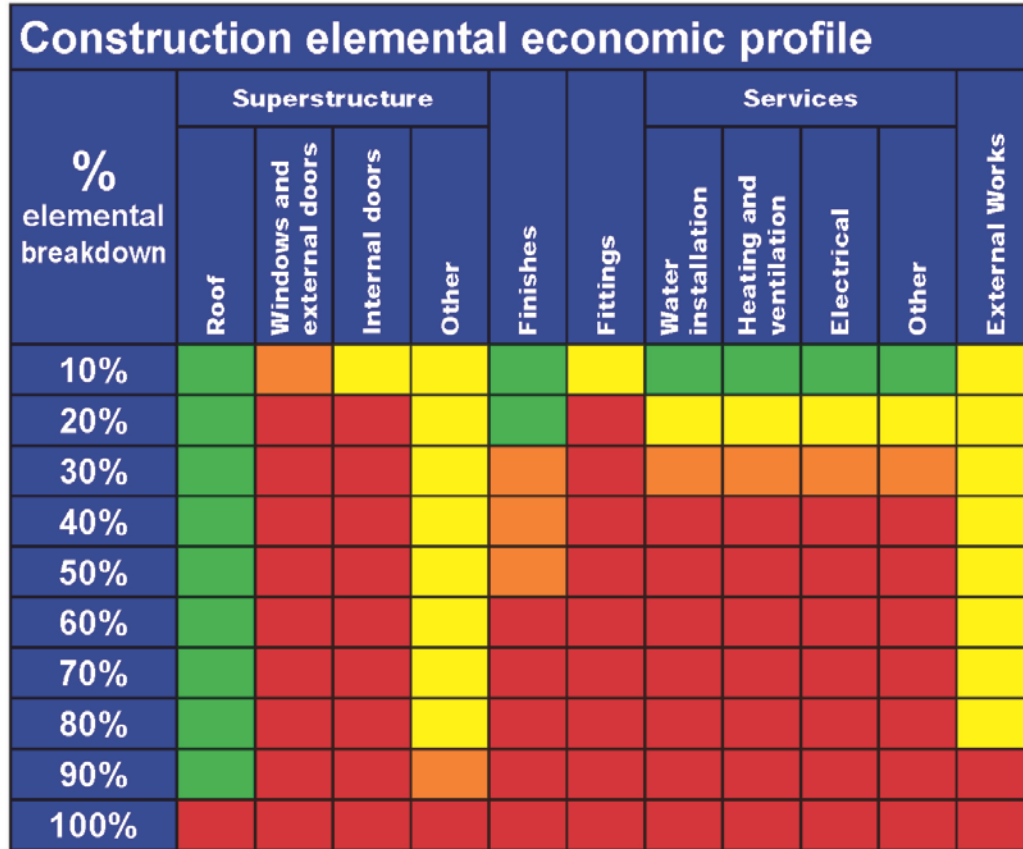
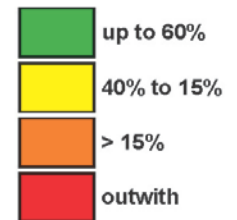


Chart colour legend
Remaining economic life span



Economic profile value in £K (£1,000)

	Outwith	last 15%	Investment	Totals								
Outwith	£32	£42	£108	£12	£69	£48	£56	£215	£224	£42	£16	£864
last 15%	£0	£4	£0	£12	£42	£5	£8	£31	£32	£18	£0	£152
Investment	£7	£46	£12	£22	£65	£5	£0	£0	£0	£20	£0	-£178
*Balance based on current condition											Balance	£838

Housing Portfolio

- **25,000 plus Houses**
 - 3,000 Low Rise Blocks
 - 21 Multi-Storey Blocks
 - 47 Sheltered Complexes
 - 10,000+ Terraced and Semi Detached

Key Issues

- **Scottish Housing Quality Standard**
 - Must Meet Tolerable Standard
 - Free from Serious Disrepair
 - Energy Efficient
 - Modern Facilities and Services
 - Healthy Safe and Secure
- **Increased Planned Maintenance**
- **Future Proof Portfolio**
- **Increased Tenant Satisfaction**

SHQS

6	WC (or waterless closet) present
7	Bath &/or shower & wash hand basin with hot & cold water supply present
36A	Bathroom wash hand basin/fittings in good condition
36B	Bath or shower & fittings in good condition
36C	Main WC & fittings in good condition
36D	Hot & cold water supply to wash hand basin, bath/shower in good condition
42	Mechanical ventilation in bathroom (if more than 5% damp)

3	Adequate lighting, ventilation & heating
21	External wall finish in good repair
31	Cavity wall insulation

24	Individual balconies in good repair
28	Individual windows & doors in good repair
33	Hot water tank & pipe insulation
43	External noise insulation (double, triple glazing if required)
25	Attached garages in good repair

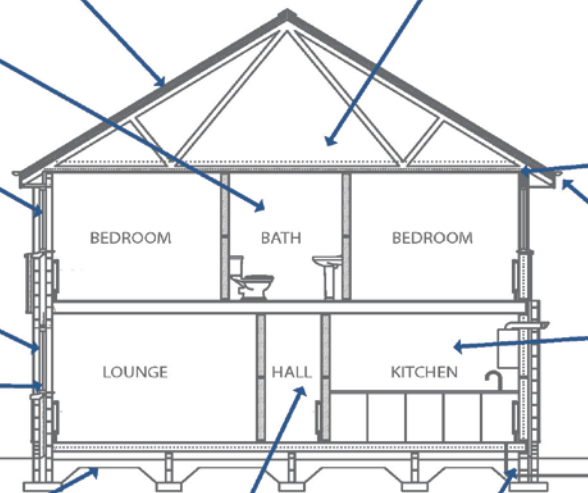
11	Adequate/safe electrical installations
13	Wall structure in good repair
14	Internal floor structures in good repair
45	Safe electrical system

49	Safe paths/paved areas/courts/drying areas
51	Safe bin stores

1	Structural stability
2	No rising damp or penetrating damp
15	Foundations in good repair
27	Damp proof course in good repair
30	Underground drainage in good repair

16	Roof structure in good repair
17	Main roof covering (slates, tiles etc) in good repair
18	Chimney stacks in good repair
19	Flashings in good repair

35	Minimum energy efficiency rating of National Home Energy Rating (NHER 5) or Standard Assessment Procedure (SAP 50 (gas)) or 60 (other systems)
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10	Easy access to external doors & outbuildings
26	Internal stairs in good repair
44	Safe smoke alarms/detectors
53	Secure individual dwelling door locks

4	Wholesome water supply
8	Adequate foul/surface water drainage
41	Lead free pipe work (within the property)

Common elements for flats not shown here	
22	Common access decks/galleries in good repair
23	Common access stairs and landings in good repair
29	Common windows/roof lights in good repair
47	Safe lifts (lift car only)
48	Safe lobbies, hall & passages
50	Safe refuse chutes/chambers (multi-storey)
52	Adequate common/public lighting
54	Secure common front door entry system
55	Secure common front and rear access doors

12	Adequate thermal insulation (also element 32)
32	At least 100 mm of loft insulation (also element 12)

20	Rainwater goods (gutters etc) in good repair
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5	Sink with hot & cold water
9	Fixed power source & space for cooking food
34A	Full central heating (range of fuel types)
34B	Efficient central heating
37A	Kitchen sink unit in good condition
37B	Kitchen cabinets/worktops in good condition
37C	Hot & cold water supply to sink in good condition
38	Safe kitchen working layout
39	Adequate number of kitchen electrical sockets (minimum 6)
40	Adequate kitchen food storage
42	Mechanical ventilation in kitchen (if more than 5% damp)
46	Safe gas/oil system & appliances

Colour key:

Must meet Tolerable Standard (the basic legal minimum standard)

Must be Free from Serious Disrepair

Must be Energy Efficient

Must have Modern Facilities and Services

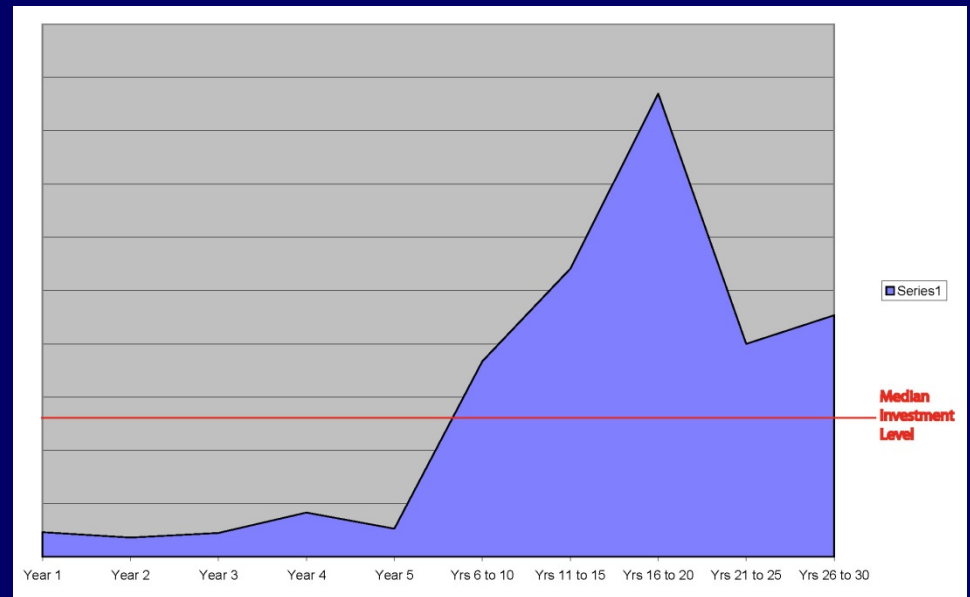
Must be Healthy, Safe and Secure

Stock Survey Approach

- **The Use of Stratified Sampling**
 - Limitations
- **Importance of Good Information**
 - Targeted Investment
 - Identifying Issues and Options
- **Better Informs Investment Decisions**
- **Developing Tools to Ease the Process**

Codeman

- Electronic hand held iPags
- 30 year profiling
- Identify investment peaks
- SHQS compliance
- EPC and SAP ratings
- Detailed attribute and life cycle information



House Typing



House Types

Permanent Reference Number: HTR 008
 Temporary Reference Number: A38
 Site Reference Number: 4 BL 01

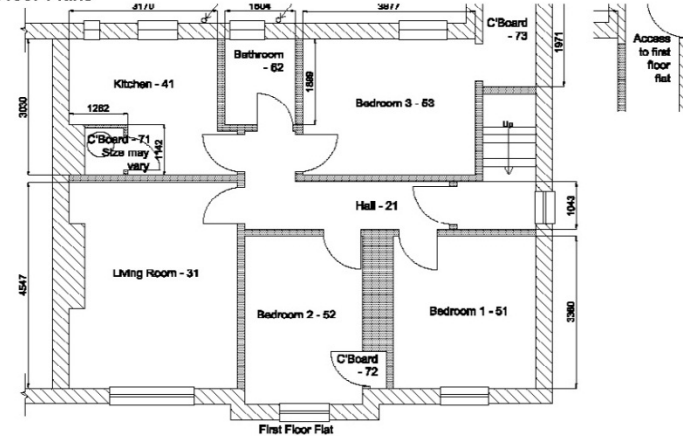
Attributes

Year of Construction :	Circa 1945
Wall Construction:	Substructure: Brick Walls, Walls: Wet dash render
Roof Construction:	Timber trusses with concrete tile.
Number of Storeys:	1
Gross Internal Area:	
Heated Volume:	
Energy Performance	

Variations

- House Style A Left handed ground floor
 B Right handed ground floor
 C Left handed first floor
 D Right handed first floor

Floor Plans



Stock Survey Approach

House type referencing process

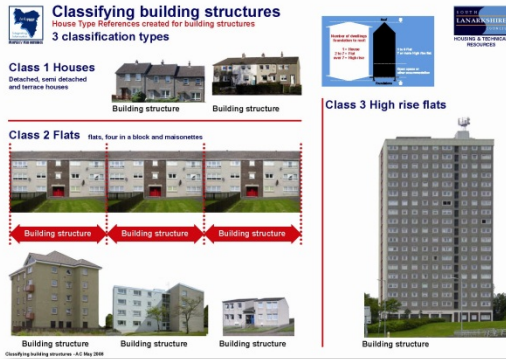
1 Identify building structure

Classifying building structures
House Type Referencing created for building structures
3 classification types

Class 1 Houses
Detached, semi detached and terrace houses

Class 2 Flats flats, four in a block and maisonettes

Class 3 High rise flats



The diagram shows three classification types with corresponding photos and labels: Class 1 Houses (detached, semi-detached, terrace), Class 2 Flats (four in a block, maisonettes), and Class 3 High rise flats. A small diagram shows a house with a roof and foundations, with a 'Number of dwellings foundation to roof' label.

2 Identify class type

Determining building structure classification
House Type Referencing

Roof

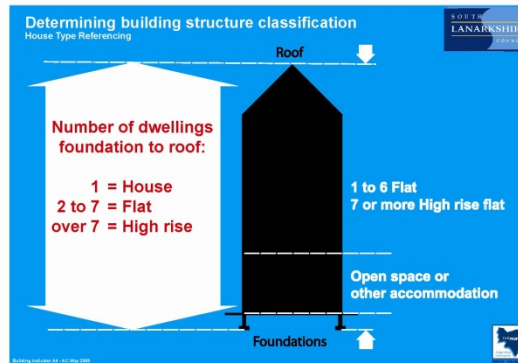
Number of dwellings foundation to roof:

- 1 = House
- 2 to 7 = Flat
- over 7 = High rise

1 to 6 Flat
7 or more High rise flat

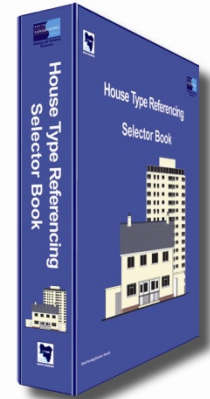
Open space or other accommodation

Foundations



The diagram shows a house silhouette with a roof and foundations. A downward arrow points to the roof, and an upward arrow points to the foundations. The text explains that the number of dwellings from foundation to roof determines the classification: 1 = House, 2 to 7 = Flat, and over 7 = High rise. A separate box indicates that 1 to 6 flats are classified as flats, and 7 or more are classified as high rise flats. There is also a note about 'Open space or other accommodation'.

3 Reference (with variant)



Advantages

- **Solutions Applied Across Portfolio**
- **More Strategic and Consistent Solutions**
- **Investment Scenario Planning**
- **Quantities included in Model**
- **Improves Client/Member Knowledge**
- **Client Perspective**
- **Identifying Core Non Core Stock**
- **Improves Decision Making**
- **Better Targeted Investment**
- **Long Term Approach**



Questions

And

Discussion