



SOUTH
KESTEVEN
DISTRICT
COUNCIL

Maintenance Strategy Corporate (General Fund) Property Assets

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Introduction

This Strategy sets out South Kesteven District Council's approved approach to the development and management of maintenance activity across its corporate property responsibility.

The Strategy contains the principal elements of our approach to asset maintenance i.e. structure and methods of assessment allied to performance objectives and scope of maintenance.

Context

South Kesteven District Council has adopted a strategy of full compliance and total maintenance in respect of its property portfolio. The strategy will apply to all General Fund (GF) Property Assets for the duration of the Authority's ownership of the asset.

Property will be held by the Authority either as an operational, community, or investment asset and maintained to the agreed standard.

Repair and maintenance planning will focus initially on the requirements of business-critical assets and on those assets where compliance failure is reported, or urgent repair is prudent to good management. The overall approach will centre on knowledge-based decisions; planning; pre-planning; quality and identifiable & robust control mechanisms.

Assets Definition

South Kesteven has a substantial and varied GF property portfolio of land and property assets. These assets are currently valued at £66,482,000 GBV (as of 31/03/2023).

The principal areas of the GF portfolio include:

Operational portfolio

- Civic buildings – our main civic office buildings
- Environment buildings – including waste depots or parks buildings.
- Community buildings – community centres
- Art Centres and Theatres

Non-Operational

- Leisure buildings – wet and dry sports centres
- Environment buildings – including sports pavilions, car parks & travellers site
- Libraries and museums
- Historic buildings – St Leonard's Priory, Stamford
- Cemeteries and crematoria
- Investment properties
- Community assets - assets that the council intends to hold in perpetuity for public use including parks & recreation grounds, monuments, cemeteries and allotments.

A register of these assets is detailed in Appendix A

Asset Management Strategy

It is recognised good practice for local authorities to produce an Asset Management Strategy (AMS) setting out their broad objectives for the management, development and rationalisation of their built and land asset base over a three to five-year period. The AMS for South Kesteven District Council was approved in September 2022 and covers the period 2022 – 2027.

Asset management provides a structured process to ensure value for money in serving the needs of the organisation. Property assets are expensive, in terms of both their capital value and annual maintenance and running costs. They need to be carefully managed over their lives to ensure best value through their use, maintenance, and generation of income.

The AMS can only be effective in the context of the Council's Corporate Plan, the current asset base and the financial operating environment.

The key to ensuring property assets deliver what is required for the Council, its residents and its partners is by ensuring the use and management of assets is linked to the Council's priorities and key strategies.

Five priorities are highlighted in the Corporate Plan, based on an analysis of the current performance of South Kesteven both as a district and as a council, and emerging opportunities and challenges:

Priority 1 – Connecting Communities

Priority 2 – Sustainable South Kesteven

Priority 3 – Enabling Economic Opportunity

Priority 4 - Housing

Priority 5 – Effective Council

([South Kesteven District Council Corporate Plan - 2024 to 2027.pdf](#))

Actions that will help the Council achieve its goals include:

- Investment to improve the leisure facilities
- A commitment to reduce the council's carbon footprint
- Embedding an approach that seeks to continuously improve our service delivery, including good governance and staff and customer experience
- Undertake an asset management review to ensure that the property portfolio contains appropriate assets to support the Council's Corporate Priorities and make effective use of the assets in delivery of strong public services.

All aspects of building and facilities management across service departments will be reviewed to avoid duplication and inefficient practice, allowing the Council to generate savings related to resource costs.

South Kesteven Climate Action Strategy

On 26 September 2019, South Kesteven District Council formally declared a climate emergency, recognising the urgent need to accelerate carbon emissions reductions, and the fundamental role that local authorities can have in leading, shaping and enabling local action.

South Kesteven District Council also set the target to reduce the organisation's carbon footprint by at least 30% by 2030 and to endeavour to become net-zero carbon as soon as viable before 2050. By 2030, our vision for South Kesteven is that:

- Buildings across South Kesteven have high energy efficiency, reduced dependence on fossil fuel heating systems and are better adapted to the impacts of climate change
- South Kesteven has increased renewable energy generation and is more self-sufficient for energy
- South Kesteven has a strong low-carbon economy and there are more low carbon employment opportunities
- Wildlife habitats are valued, maintained, enhanced and created in South Kesteven and biodiversity is restored
- Emissions from transport are reduced throughout South Kesteven and there are more flexible and low carbon travel options
- Waste is valued as a resource and circular economy principles in practice, water efficiency and management is improved
- People are more aware of the value of a clean and healthy environment and we are better adapted to a changing climate and extremes of weather
- Climate and net zero considerations are fully embedded within South Kesteven District Council's decision making at every level

Buildings are currently responsible for more than 40% of global energy use, and one third of global greenhouse gas emissions. South Kesteven is in line with this global pattern: in 2020, Domestic, Industrial, Commercial and Public Sector buildings accounted for 40.5% of overall reported greenhouse gas emissions. As one of our defined themes, Built Environment interacts with other themes, principally under Power for considerations of energy supply and use to buildings, as well as Transport for links for existing and new developments and Resources regarding considerations of build materials and embedded carbon. Decarbonising buildings is a fundamental challenge. In order to meet the national net zero goal, carbon emissions produced in heating and powering our homes urgently need to be addressed for our homes, workplaces and public buildings.

SKDC Property Services

In accordance with the Team structure and the AMS, the Property Services Team will:

- Act as an enabler for all service delivery.
- Provide design and project management services.
- Provide a stable, fully integrated property service, with high levels of customer care and clear roles and responsibilities around the landlord/tenant relationship.
- Enable the design of attractive, functional and sustainable buildings on time and within budget.
- Provide, manage and maintain good quality facilities for the district's residents and staff, improving customer confidence and satisfaction.
- Take the lead role on safety and statutory compliance within buildings. Effectively manage all property related risks.

- Manage the Council's property portfolio.
- Optimise available resources, including personnel, spatial management and innovation through value for money projects.
- Provide accurate and relevant data around buildings and business performance to inform stakeholders.
- Ensure best value through prioritisation of maintenance spend, backed by effective procurement arrangements.

The adoption of this approach will ensure that buildings are viewed as a corporate resource. It will contribute to the optimisation of occupancy levels, improve suitability and condition, identify future investment needs, improve efficiency, reduce CO2 emissions/ generate energy savings, ensure compliance with leases and ensure internal and external occupational agreements are in place.

South Kesteven District Councils Property services team sit under the authorities Finance directorate, with Deputy Chief Executive and s151 Officer holding overall responsibility for the Property Services function.

Structure and Responsibilities.

The Council has a dedicated Property Services team whose primary purpose is the management of the Council's Corporate estate. The Property Team sits within the directorate of the Deputy Chief Executive (s.151 Officer) and managed by the Head of Property and ICT whose role also includes the development of maintenance policy, strategy and guidance, commissioning of condition surveys, budget responsibility and strategic procurement.

Property Services Asset Management System – recording and scheduling.

All assets and their associated attributes (including asset tagging) will be recorded on the Council's corporate asset management system which will be used as the primary database for analysing, monitoring and reporting the Council's performance on its asset management arrangements. The system will be used to develop the maintenance plans for each financial year which will be also based on an assessment criteria that is set out in the Maintenance Strategy.

The Council has recent invested in a comprehensive asset management system in order to effectively manage the Council's General Fund corporate property management estate. This system will be primarily used to capture and manage the property estate using the data captured through the delivery of the Maintenance Strategy Action Plan.

Definition of Maintenance

Building components deteriorate with time or use and at some stage their performance no longer meets a required standard. The Royal Institute of Chartered Surveyors (RICS) define maintenance as follows:

“Maintenance is an intervention so that the component can perform to the required standard.”

Maintenance Objectives, Methodology and the Maintenance Planning Process.

In order to meet the principle strategic objectives of the Councils approach officers involved in the maintenance planning process at all levels, will take into account and employ the 11-stage process

model contained in BS 8210:2020 - maintenance planning process which is discussed later in this guidance.

The Deputy Chief Executive will sponsor, approve and provide support to the whole process. They will provide corporate direction and work with the Head of Property and ICT to develop maintenance objectives and identify resource requirements.

The Head of Property and ICT and the Senior Assets Officer will be responsible for establishing asset definition, performance requirements, maintenance identification and prioritisation and preparation of plans.

The Property Services team will be responsible for the implementation of maintenance plans, procurement of works, programme monitoring (time, cost & quality) review, and control and reporting of performance.

The whole process will be supported by the Property & Assets Support Officer who will ensure that the Authorities property system is maintained, updated and remains fit for purpose.

Maintenance Standards

Minimum Standards for Service Delivery

The principal standard applied by the Authority in its approach to the development and delivery of an effective and robust system of maintenance is: - 'BS 8210 – 2020 Maintenance Management Code of Practice standard is supported by relevant elements of BS 3811 – 1993 in conjunction with applicable British Standards and Codes of Practice relevant to specific practice and requirements.

At all times and in respect of all elements of maintenance activity, the appropriate standards and codes of practice should be referenced and adhered to.

This approach will be underpinned by the Authorities Contract Procurement regulations and supplier selection process.

This British Standard does not prescribe "how to do maintenance" but acts as the basis of an approach for achieving successful maintenance outcomes for a range of facilities. It is intended to assist facility owners and operators, or those acting on their behalf, in regard to facilities maintenance management in aligning the formulation and implementation of maintenance strategies and policies to the core business objectives of the organisation in the most efficient and effective way.

Health and Safety

Throughout the development of the overall approach to maintenance and maintenance planning, the Authority will, continually reference the applicable requirements of H&S legislation and HSE codes of practice as they apply to any identified works.

This applies to the contractor(s) and their levels of compliance and approach to H&S (for employees and all third parties) as well as a recognition of the Authority's own responsibility as direct and indirect employers and agents. As an element of the maintenance planning process, the Authority must consider and develop a schedule of core procedures to ensure contractor compliance with national standards and with the council's own standards.

Maintenance Objectives, Methodology and the Maintenance Planning Process

BS 8210:2020 advises that maintenance planning should adhere to the following (structured) approach. This approach will be adopted as required on an asset by asset basis by the Authority.

1. The assets required to support the business and the delivery of services should be identified and defined.

This includes both operational, community, and investment assets [property]. For investment property, the extent of the Authority's obligations should be identified. Where no direct responsibility exists e.g. where tenants are in occupation, the tenant's performance obligations under the terms of the lease must be monitored on a regular and pre-determined basis. Infrastructure refers to building services i.e. electrical and mechanical & engineering. All property assets will be recorded on the Authorities asset system.

2. The required level of facility asset performance, including any performance indicators, should be agreed and recorded.

Note. The level of performance should reflect the facilities required availability followed by the occupational requirements; cost in use; sustainability and agreed secondary factors.

3. The condition and sufficiency of facility assets for their intended purpose should be recorded.

Note. The requirement will be met through a process of scheduled inspections for physical condition; mechanical; electrical and engineering services and compliance. Facilities inspections [e.g. space; location and infrastructure performance] should be programmed.

4. The scope of the maintenance required should be identified through GAP analysis.

Note. This requirement will be met having regard to the results of the surveys listed in 3 above. Surveys will identify current urgent, backlog and future maintenance requirements. Legal and corporate requirements can be assessed against actual recorded condition and performance.

5. An appropriate maintenance method from those available should be selected.

6. The resources required for the chosen maintenance method(s) should be assessed.

7. Short; medium & long-term plans & budget estimates should be prepared.

8. Tactical and individual maintenance plans should be prepared and agreed.

9. Resources required and identified in (6) above should be confirmed.

10. Begin plan implementation and programming.

11. Performance monitoring; plan and delivery review.

The standard suggests that the information secured as a result of the process should be used to reinforce the Authority of the strategic fit of each individual asset and its contribution towards the fulfilment of the Corporate Plan aims and ambitions.

Strategic Approach

At the highest level, the maintenance system and strategic approach should align with the principles of asset management identified in the Authority's 'Asset Management Strategy' and specifically those strategic initiatives which align with, support and inform the overall maintenance of the property portfolio and the retention of a safe, compliant and value driven estate.

Specific strategic audits will be undertaken which will help focus initiatives which support, and direct maintenance activity are: -

1. Building condition assessment – this will involve a systematic evaluation of a building's physical state and functionality, encompassing various components, systems, and structural elements. These assessments aim to provide an objective snapshot of a building's condition at a given point in time.
2. Mechanical & Electrical Physical condition assessment - This will assess the condition of a building's mechanical and electrical systems, providing insights into their performance and identifying areas for maintenance or upgrades.
3. Buildings & Facilities Compliance audit - a range of legislation governs the use, occupation and maintenance of land and buildings. A review will be undertaken to ensure that the Council comply with the legislative requirements to protect the building fabric, systems and users.
4. Sustainability audit (A sustainability audit analyses internal and external factors, including carbon footprint, water and energy expenditure)
5. Utility usage audit

The results of these audits will help the ongoing formation of the future maintenance plans.

Maintenance: Strategic Approach

To complete the strategic approach, the following is required: -

- Risk approach,
- Immediate maintenance issues
- Property classification models
- Maintenance methods available for medium and long-term management

Addressing the following elements will further support the requirements of the strategic approach. Strategic Asset Management Policy Strategic Asset Management Plan Asset Management Strategy Maintenance Strategy Principal Maintenance Plan Action Plans

Risk Management

Risks associated with maintenance will be managed in the following order of priority;

- Assets requiring immediate maintenance to prevent injury and/or financial loss.
- Maintenance in respect of H&S issues.
- Statutory maintenance requirements; security, fire, gas, electrical and water.
- Structural maintenance and structural integrity including building fabric.
- Elements within the curtilage of any facility for which the Authority has responsibility.
- Maintenance of unoccupied assets identified for disposal; demolition or other purpose.

Immediate Maintenance Programme

Following the structural; compliance; H&S and M&E surveys, any defects or maintenance issues identified as urgent or critical (see priority rating below) will be rectified through a planned programme of urgent work. The urgent work programme / plan should be regarded as a priority initiative within the principal maintenance plan.

Property Classification Models

In order to ensure a balanced programme of immediate and planned maintenance and optimise the available resources, the Authority will classify physical property assets according to the following models. These models will set the direction & timeframe for maintenance activity.

Prioritisation of Works

Property Rating

Properties are ordered of their functional corporate importance. Decisions in respect of importance & service delivery will be made and approved by the Authority's 'Property Review Group'. These categories will be split into the following areas:

Operational Assets -

- Critical to core service or high-profile asset to be in the best possible condition, maximum availability required.
- Important to core service, asset to be in good condition operationally and aesthetically, minimum downtime.
- Core service, asset to be in compliant and in reasonable condition, able to meet operational and statutory requirements.

Non – Operational Assets -

- Non-core service operational facility. Meets minimum acceptable statutory and operational requirements.
- Non-core service, non-operational property maintained to meet minimum statutory requirements only. Unoccupied and considered to be ancillary to requirements subject to asset review.
- Investment Property externally managed.

Condition Surveys

A building condition survey is an assessment of the physical condition of a building or group of buildings. It involves a thorough inspection of the building's structure, systems, and components, such as the roof, walls, floors, electrical and mechanical systems, and any other relevant features.

The Authority will undertake condition surveys to assess the physical condition of a building to assess its maintenance and repair status at a specific point in time. These surveys are typically non-intrusive and are carried out by qualified professionals.

Condition surveys serve strategic estate management by helping to identify the following.

- Identify necessary maintenance work.
- Estimate costs for repairs.
- Prioritise work based on available funds.
- Understand any changes in building conditions.

Survey Contents: A condition survey covers various aspects, including:

- Structural elements.
- Roofs.
- Building fabric.
- Windows and doors.
- Mechanical and electrical systems.
- Asbestos.
- Utilities.
- Drainage.
- Fire safety and security.
- Site layout.

Condition Rating

The table categorises the condition of an identified building or facility by applying a Government approved rating system. Condition assessment will be based on the real time data collected [initially] from the programmed condition surveys.

The condition rating is a simple but comprehensive description of the overall condition of the element expressed as complying with one of four categories:

Grade	Expression	Description
A	Good	As new and performing as intended and with regular maintenance will continue to operate efficiently.
B	Satisfactory	Performing as intended but exhibiting minor deterioration.
C	Poor	Exhibiting major defects and/or not operating as intended and will require attention in the short term, although not immediate.
D	Bad	Life expired and/or serious risk of imminent failure.

Priority Rating

Government approved rating system. Identifies the degree of urgency and level of importance attached to identified defects.

- **Urgent** - Work required to prevent immediate closure. Addresses a [potentially] serious failure of structure; breach of legislation and/or poses a general risk to health & safety.
- **Essential** - work required [within 2 years] to prevent serious deterioration of fabric or building services or remedy minor breach of legislation or H&S and which can be managed until full maintenance effected.

- **Desirable** - work required within 3 to 5 years which will prevent the deterioration of fabric or service and/or address low risk minor breaches (legislation and/or H&S).
- **Long term** - work required beyond a five-year window.

Reason Rating

Identifies the nature of the defect reported. Where any defect covers more than one of the identified definitions, the most serious definition will determine the priority level. Where there are competing facilities, with the same priority ratings, additional reason ratings should be considered.

Reason ratings should always be recorded as they can provide a history of individual or group asset failures and an indication of (any) emerging patterns of failure. Any identified patterns may serve to inform and subsequently re-direct planned maintenance activity.

- R1 Statutory or Health & Safety breach
- R2 Total or partial loss of service
- R3 Deterioration of fabric; structure or services
- R4 Security implications
- R5 Disabled access implications

The information obtained by the condition rating, the priority rating and the reason rating will be assessed in order to develop a prioritisation methodology that ensures that the financial resources are directed and targeted at the specific assets.

Maintenance Methods

The approach to maintenance should be considered under four principal headings; Reactive, Planned Preventative, Cyclical and Predictive maintenance.

Reactive Maintenance

Reactive maintenance is the “The required repair, replacement or restorative action performed on an asset, after the occurrence of a failure, in order to bring the asset to at least its minimum acceptable condition”.

Reactive Maintenance should be carried out as quickly as possible, in order to restore an asset to a safe and operationally efficient condition.

Planned Preventative Maintenance

Planned Preventative Maintenance (PPM) is defined in RICS professional standard as:

“maintenance that is performed purposely and regularly to keep the structure and fabric, facilities, plant and equipment of a building in satisfactory operating condition. This is achieved by providing for systematic inspection, detection and correction of failures, either before they occur, where actually present or before they develop into major defects.

PPM also helps to identify the point at which such items can reasonably be deemed to have reached the end of their economic lives, such that replacement or renewal may be necessary. PPM programmes are usually prepared to cover 5–10-year maintenance periods but can extend up to 30 years in duration and should be regularly reviewed and updated at frequent intervals”.

Preventative maintenance comprises pre-planned actions performed on assets before the occurrence of a failure in order to protect them and to prevent; eliminate or minimise degradation and downtime.

Applicable to facilities and/or assets whose failure or interruption could have serious implications. It maintains facilities and assets in such a condition that breakdowns and emergency repairs are minimised. Activities include replacement; adjustments; major overhauls and inspections.

The most relevant Planned (Preventative) maintenance methods applicable to the Authority include:

Preventative Maintenance

- Programmes of work developed from planned; periodic inspections. Designed to address major maintenance issues where significant failure or deterioration has been identified and maintenance input is required to restore the asset to its intended level of condition and performance.
- Routine Maintenance. Activity, which is planned, repetitive and periodic such as minor adjustments, painting, cleaning, lubrication, service interval maintenance.
- Running maintenance. Minor routine maintenance carried out prior to planned maintenance and not impacting on the occupation or use of the facility.
- Opportunity (preventative) Maintenance. Performed in a window of opportunity and having positive cost implications.

Term Maintenance (Preventative, Cyclical, Servicing or Time Based).

Used to comply with statutory or manufacturer's requirements and for building services. Undertaken at predetermined time intervals as required by statutory, technical or operational reliability considerations. This may be applied to building structures, fabric, services and site improvements but is used predominantly for the maintenance of mechanical and electrical services.

Deferred (Backlog) Maintenance.

Comprises corrective maintenance activity not immediately initiated following the occurrence or identification of a failure but deliberately delayed due to resource or other operational issues.

