



WEST LOTHIAN COUNCIL

**Property Management and
Development**

**Team Plan
2010/2011**

April 2010

DATA LABEL: PUBLIC

CONTENTS

Page

Foreword	2
1.0 CONTEXT AND OVERVIEW	4
1.1 Strategic Statement	4
1.2 What We Do	4
1.3 Organisation Chart	4
1.4 Service Standards	4
1.5 Links to Corporate Objectives, Strategies and Plans	4
1.6 Economic And Social Context	6
2.0 SERVICE PERFORMANCE 2009/10	7
2.1 Service Review	7
2.2 Performance	9
2.3 Continuous Improvement and Initiatives 2009/10	9
2.4 Benchmarking	10
2.5 Civic Centre	10
3.0 TRANSFORMATIONAL CHANGE – DIRECTION 2010-11	11
3.1 Objectives 2010/11	11
3.2 Transformational Change Programme	12
3.3 Continuous Improvement	13
3.4 Main Initiatives 2010/11	13
3.5 Regulatory Change and other Challenges	14
4.0 HOW WE DELIVER THE SERVICE	15
4.1 Service standards	15
4.2 Equality and sustainability	15
4.3 Customer Focus and Consultation	15
4.4 Freedom of information	17
4.5 Corporate Governance and Business Risk Register	17
4.6 Service principles	17
4.7 Resources	18
Appendices	
1. Scope of activity	21
2. Service and staff structures	24
3. Service standards	25
4. The Strategic Context	26
5. Links to National Outcomes and Life Stages Outcomes	29
6. Performance Indicators	30
7. Workforce Planning Analysis	41
8. Previous Service Initiatives — Current status	43
9. Customer consultation methods – analysis and programme	47
10. Customer Consultation review 2009-2010	50
11. Activity Budget 2010/2011	62
12. Initiatives 2010/2011	68

FOREWORD

Property Management and Development (PM&D) delivers a professional service to internal and external customers, including aspects of valuation, agency, portfolio and operational property management, and development. Activity focuses on the management of the council's non-operational (i.e. commercial) property portfolio and its Headquarter buildings. The unit plays a significant role in supporting the council's capital investment programme and is involved in the development of property to support business and industry locally.

The purpose of this Team Plan is:-

- to provide a clear statement of the objectives of the service
- to review performance against last year's targets
- to report on activities, initiatives and achievements from the past year
- to set out clearly the targets for each sub-activity, and the key areas for improvement in the Service for the coming year; and
- to identify the resources needed to carry out these duties successfully.

The Plan is primarily intended for PM&D staff, to place their activities in the wider context of the council's operation. Thereafter it is aimed at the Head of Property Services and the Director of Development and Environmental Services, to whom an abridged version is reported as part of the Property Services Management Plan; and ultimately at the Council's Management Team and Elected Members to establish their agreement that the key activities set out, the targets proposed and the resources to be used are appropriate for the Council's overall benefit and objectives.

The coming year presents PM&D with a number of key new challenges:

- Transformational change – In common with all services PM&D will be focussing on changes required to deliver budget savings
- We have assumed additional budgetary responsibility for a significant proportion of the council's occupational costs for its operational properties, in accordance with the Asset Management Plan
- All non-domestic property in Scotland falls to be re-valued for rating purposes on 1 April 2010, and we will be managing the council's appeals process in order to secure savings where possible.
- The procedures for the valuation of the council's property assets are to change under the IFRS regulations.
- PM&D is to be assessed for the Customer Service Excellence Award in the early part of the year.
- The Royal Institution of Chartered Surveyors (RICS) promotion of regulations for Valuer Accreditation may impact on our professional staff, and we will also need to monitor the RICS move towards property management accreditation

In addition to these new challenges the severely depressed state of the property markets following the credit crunch will continue to have an impact on our ability to meet capital and revenue income targets and we will be striving to deliver our full range of services as efficiently and effectively as possible.

1. CONTEXT AND OVERVIEW

1.1 Strategic Statement

PM&D's Strategic Statement governs the way in which we deliver our service, its future direction and development.

“We will provide an efficient and effective professional property advisory and management service, responding to our customers needs, and committed to continuous improvement.”

1.2 What we do

PM&D's activities comprise 5 main areas:

1. Disposal of surplus property/capital receipts programme
2. The management of the council's non-operational portfolio of properties and the control of rent arrears
3. Professional Services, including
 - The valuation of land and property
 - Maintenance of property records including the Property Terrier
 - The provision of expert advice
4. Industrial and Business Property Development, and
5. The management of the council's Headquarter buildings (including Civic Centre), and operational property budgets

Detailed information on these five areas, and the objectives, scope and outputs of the associated sub-activities is given in Appendix 1.

1.3 Organisational chart

PM&D is one of three service units reporting to the Head of Property Services. The service and staff structures are shown in Appendix 2

1.4 Service Standards

The delivery of our service, and in particular our approach to dealing with customers and the outcomes they may expect, is governed by our Service Standards. During the course of 2009/10 we reviewed and revised our Service Standards, and consulted with customers and stakeholders on their relevance and clarity. Our new Core and Customer Standards were adopted in January 2010, and are reproduced in Appendix 3. We are in the process of reviewing and developing appropriate indicators, so that our performance against these Standards can be measured and reported to customers. More detail is given in the section on Service Delivery.

1.5 Links to Corporate Objectives, Strategies and Plans

The majority of PM&D's activities are discretionary, rather than having a statutory basis. However, as one of the largest property owners in West Lothian the council must effectively and efficiently manage its property assets. In this respect property management is an essential service, which could not be considered optional. Similarly, property development, which is primarily for economic development purposes, is a discretionary service, having its basis in s20 of the Local Government in Scotland Act 2003 – the power to advance well-being.

However, we do have a statutory obligation under s74 of the Local Government (Scotland) Act 1973, to secure the “best consideration that can reasonably be obtained” in the disposal of the council's property assets.

The Community Plan (“Towards 2020”) sets out the shared vision for West Lothian in the next 10 years, agreed by the seventeen Community partner organisations.

“Overall we want to provide an improved quality of life for everyone that lives, works and does business in West Lothian.”

The Plan includes 6 Aspirations, the following of which are most relevant to PM&D:

1. We strengthen our economy through an improved range and quality of businesses and we raise the quality of life through increased economic participation.
2. We manage and balance the effects of an increasing population and social and geographical diversity, to protect and improve our physical environment for the future
3. We achieve a more inclusive community by providing housing, health and social care services in an integrated way which allows all groups of people to live as independently as possible

During 2008 the Community Planning Partners and the Scottish Government signed the West Lothian Single Outcome Agreement (SOA), which sets out the key priorities for the period to 2011. The SOA identifies 12 joint challenges and priority outcomes, each aligned to a Community Plan theme. For PM&D the challenges relating to the themes of a Changing Community, and a Prosperous Community have the greatest relevance.

The council’s Corporate Plan (2007 – 2011) also provides part of PM&D’s strategic context – particularly the priorities “Making our economy stronger” and “Planning for population growth”.

Our activities specifically concentrate on the following council values:

- Focusing on our customers needs
- Providing equality of opportunity
- Working in partnership, and
- Making best use of our resources

With its community partners, the council has also embarked on Locality Planning, based on the nine multi-member wards. This model promotes the coordination of resource allocation and service delivery between public agencies, and endeavours to make that delivery more responsive to local needs. For PM&D our response to the Locality Plans is more likely to be reactive, as we may need to respond to the requirements of other services, perhaps as a consequence of partnership working or a re-focusing of resources.

More detail on the linkages to these higher order strategies and values as they are relevant to PM&D, is given in Appendix 4.

Two further district-wide plans are relevant to PM&D’s activities – the West Lothian Local Plan and the West Lothian Economic Strategy (to 2010). In January 2009 the council formally adopted the West Lothian Local Plan, which is intended to guide development activity across West Lothian for the coming 5 years. The Local Plan includes ambitious projections for the growth of West Lothian’s population – indicating a growth of 26,000, c 16%, between 2005 and 2020. Such growth requires an increase of c25% in the number of households, from 69,000 to 87,000. Employment in West Lothian has increased from c 59,000 to 74,000 between 1995 and 2005, and there is projected to be a 20% increase in the population of working age by 2025. In addition, trends between the 1991 and 2001 censuses show an actual reduction in the number of residents commuting out of the area to work, and a significant increase in those coming into West Lothian to work.

The Planning and Economic Development frameworks present PM&D with a number of long term opportunities and challenges. For example, our programme of disposal of residential development sites is intended to support the projected growth in population; the projected growth in employment will provide opportunities for business property development, and demand for business development sites. PM&D is therefore involved in the implementation of key Local Plan objectives and also contributes to the delivery of the West Lothian Economic Strategy. However, in the short term the context for the delivery of our services is affected more by the economic climate.

Two other significant corporate initiatives influence the delivery of PM&D’s Service:

Corporate Asset Management Plan:

The efficient use of its property assets is a high priority for the council, and the corporate Asset Management Plan (AMP) increasingly influences PM&D's activities, in dealing with both operational and non-operational properties. The AMP links corporate objectives with property investment decisions – providing the basis for developing the council's capital programme – as well as assessing the current performance of our property assets. For PM&D the AMP shapes the requirement to realise capital from the disposal of assets; determines the capital available for investment in both existing and new property; and will influence how we report on the performance of the non-operational portfolio. In the year ahead PM&D will also assume responsibility for the management of a significant proportion of the council's budgeted operational expenditure on its occupational properties.

West Lothian Open Space Strategy:

The council's Open Space Strategy (WLOSS) was adopted in October 2005 following an audit of open space and playing fields across the county. The strategy endorses the investment of over £8m in sports and recreational facilities over the next decade, facilitated by the reinvestment of the proceeds from the disposal of surplus properties identified through the audit. In turn, the disposal of the surplus WLOSS sites supports the council's housing strategy, and capital receipts programme.

Links to National Outcomes and the Life Stage Outcomes are shown in Appendix 5

1.6 Economic and Social Context

The performance of the West Lothian economy has a significant impact on PM&D – influencing both output and direction. In the past, the positive performance of the West Lothian economy, and of Livingston in particular, has enhanced the ability to generate financial returns to the council. A buoyant housing market has had a marked impact on capital receipts. Development activity seeks to make West Lothian a competitive business location by securing flexibility and choice in the industrial and business property market. Accordingly PM&D's development projects have been shaped by the nature of demand, the extent of the private sector's involvement, and the economic development and/or financial objectives of PM&D.

As projected in last years Management Plan the credit crunch has had the greatest bearing on PM&D's activities in the past year, and is expected to continue to affect both our core activities and the resources available for service delivery for the foreseeable future. The impact on PM&D's ability to deliver against our capital and revenue targets cannot be understated.

2. SERVICE PERFORMANCE 2009/10

2.1 Service Review

PM&D's key outcomes and outputs for 2009/10 can be summarised under our five main activities:

1. Disposal of surplus property/capital receipts programme

- Because of recent volatility in the property market our capital receipts target is regularly reviewed with colleagues in Finance Services to assist their Treasury management. Early in 2009/10 our target for the current year was revised to £2.863m.
- Even so, the credit crunch continues to have a marked impact on our ability to generate capital receipts, both in terms of the number of transactions, and the receipts that can be achieved from those disposals that do take place. Our year-end outcome was £2.446m (85.4% of target).
- Receipts included small residential development and redevelopment opportunities at Whitburn, Addiewell and Deans, Livingston; and the transfer of sites at Whitburn and Eliburn, Livingston for affordable housing.
- Demand for the sale of amenity ground for inclusion in private gardens continues to be low - with only four sales completed.
- We have continued to work, with colleagues, on the Open Space Strategy and on the preparation of planning briefs, paving the way for the release of further sites for sale when the housing market recovers. While the Adoption of the West Lothian Local Plan provides certainty in a planning context, a resolution of school capacity in certain areas is fundamental if disposals are not to be adversely affected.

2. The management of the council's non-operational portfolio

- a. The management of the council's industrial and commercial portfolio
 - Actual income received totalled £4.478m, against a target of £4.596m – i.e. 97.4% of target. (NB – figures exclude Civic Centre). The target reflected a commitment to deliver increased income as part of the council's programme of financial efficiencies. The shortfall is primarily due to the renegotiation of the rent for Almondvale Stadium.
 - Notwithstanding this outturn, the portfolio has shown the impact of the credit crunch. Occupancy levels for the offices, shops and industrial units have generally been around target, although the industrial occupancy dipped markedly since the turn of the year (See PPR PI's in Appendix 6). Nevertheless the ability to attract new tenants for many properties has been encouraging. By monitoring tenancy changes over a few months at the start of the year we established that terminations were only marginally greater than new leases. The reasons for change were mixed – new tenants came as start up businesses as well as downsizing, and terminations were not wholly due to the impact of the credit crunch. With colleagues in Economic Development we have continued to operate a protocol to provide support to tenants that are feeling the effects of the credit crunch, in order to protect both occupancy levels and income received. However, it has been harder to achieve rental growth through rent reviews.
 - We have again performed well in the Scottish Property Network's Agency League tables, our placing in the tables reflecting a high volume of new leases, primarily of small properties.
 - We continue to address the action points arising from electrical inspections of the council's portfolio, and are involved in other legislative compliance relating to legionella and the Disability Discrimination Act.
- b. The control of rental arrears
 - The introduction of payment by Direct Debit, and the charging of deposits on most new leases, continue to have a beneficial effect on our rent arrears. We continue to endeavour to reduce the backlog of arrears cases, and to ensure that we take the earliest possible action to secure recovery of any sums that aren't covered by a deposit, through Legal Services or Sheriff Officers, as appropriate.
 - Percentage arrears figures, a Core management PI that is reported monthly through Covalent, are shown in Appendix 6, and demonstrate a continued improvement over the previous year. However, in part this is due to a substantial bad debt from a single tenant, being written off – which in turn impacts on the overall revenue budget outturn. The proposed change in the calculation of the performance indicator, to provide a

more accurate measure of the level of aged and historic debt, and to enable better benchmarking of our performance is ready to be implemented, but has been delayed because of problems with IT.

3. Professional Services

- a. Rating appeals
 - Following the completion of the appeal process arising from the 2005 Revaluation we have submitted “running roll” appeals as appropriate.
- b. The valuation of land and property
 - A tranche of 20% of the council’s capital assets was re-valued over the financial year – a total of c390 properties including sports centres, hostels, libraries, visitor centres. Village halls, domestic lock-ups and garage sites. The total value of those properties re-valued comes to c£68.33m.
 - We completed 23 individual reinstatement valuations for Council houses (2008/09 – 64)
- c. The granting of wayleaves and servitudes
 - The usual varied demands from service providers for wayleaves and servitudes were satisfied as part of everyday workload, and 29 wayleave and servitude agreements were processed, compared with 47 in the previous year.
- d. The maintenance of property records
 - The council’s Property Terrier was updated to record all known changes in property ownership interests taking place over the year.
 - The exercise to scan all the council’s property titles continues to prove beneficial, providing council staff with immediate access to legal documents, with electronic copies, rather than photocopies or originals, sent to external contacts. Additional documents are added to the system as necessary.
 - A large volume of property inquiries, received from a variety of sources, was addressed
- e. The provision of expert advice on property issues.
 - A significant proportion of staff time was spent on corporate initiatives and working groups, including:
 - the West Lothian Open Space Strategy;
 - the evolving Core Development Area Strategy;
 - the preparation of the East of Scotland Strategic Development Plan; and
 - the Council’s Affordable Housing Policy.
 - PM&D has provided advice to corporate working groups on Asset Management Planning and Business Continuity Planning. We have chaired a working group tasked with the development of a strategy for the provision of allotments in West Lothian, in response to both political initiative and local demand
 - The provision of professional services to internal clients has included:
 - preparatory work for the Airdrie to Bathgate railway line – facilitating access for advance works and site investigation by Network Rail; securing the land for the construction of the new station at Blackridge; and ensuring that the council’s interests are protected, including the provision of new storage facilities at the Guildyhaugh depot
 - the leasing of land at Beecraigs Country Park for the Go-Ape visitor attraction.
 - securing land for essential road and junction improvements at Linburn and Whitburn
 - promoting a planning application for a supermarket on council land at Armadale;
 - managing preparatory work relating to the occupancy arrangements for the new partnership centre at Fauldhouse; and
 - helping the CIS to move out of Lindsay House into new premises in Bathgate
 - the acquisition of land from private owners for the provision of new cemeteries at Armadale and Fauldhouse, and negotiations for land at East Calder

4. Industrial and Business Property Development

- Our private sector partner continues the rehabilitation of the former Riddochhill coal bing to create prepared development land as an extension to J4M8 Distribution Park, and to Whitehill Industrial Estate.

- Similarly, the contract for the introduction of infrastructure to service the Heartlands Business Park has now been completed, and our joint venture partner is preparing to let the contract for the provision of a motorway junction. Interests in the development of plots in the Business Park are being pursued.
- We have secured planning consent for the introduction of infrastructure to permit the subdivision of large development sites at Rosebank and Oakbank Park in Livingston.
- We have worked with colleagues in Economic Development and Planning Services on company expansion and relocation projects.

5. The management of the council's Headquarter buildings

- We provided the facility management service to the main administrative office buildings within budget constraints, and facilitated the move of council staff to Lomond House, the Courthouse and Edinburgh Road, Bathgate.
- We have successfully completed the project management of the Civic Centre, ensuring that the building opened on schedule, and have assumed the complete property management role on behalf of all occupiers of the building.

2.2 Performance

Our WLAM assessment in early 2009 recognised that, while PM&D held historic performance information, the amount we publicise was limited. As a result it was agreed that we would carry out a full review of PM&D's Performance Indicators, covering all WLAM results categories, to ensure compliance with the council's corporate standards, and to improve how information on our performance was disseminated. An Initiative to that effect was included in last years Management Plan.

Prior to the WLAM assessment we routinely reported on 6 PI's, through the Covalent system; to the elected members through the Management Plan, and regularly throughout the year to Head of Service and Director. We have already added to these, and are now developing further PI's, to ensure that we are measuring and reporting on our performance against our revised Service Standards.

Our current suite of PI's is reported on in detail in Appendix 6. For each of our 6 Public Performance PI's we have shown the purpose of each indicator, the latest results and a comment on the trends in performance. In addition, in accordance with the corporate standards, we have a further 18 Core and Good Practice management PI's mainly covering aspects of Customer and Employee satisfaction. These are backed up by a 16 internal management PI's, and a further 17 at various stages of development, all of which are listed in the Appendix. The review of each of our activities, in section 2.1 above, also makes reference to specific performance information included in the Appendix.

We were finally successful in the council's Celebrating Success awards, winning the "Promoting Health and Wellbeing" category with the partnership project to provide a new Health Centre and sports facilities in West Calder and Polbeth. This project also secured a PM&D staff member the 2009 ACES award for Excellence in Property Management.

2.3 Continuous Improvement & Initiatives 2009/10

The active PM&D Areas for Improvement identified in the council's Initiatives database, and a summary of the current status of these initiatives is included as Appendix 8. The majority of our Initiatives derived from our WLAM assessment early in 2009 and focus on customer consultation and the reporting of suitable Performance Indicators, as noted above. Most of these have now been completed, or are approaching completion.

We have continued with preparations for our Customer Service Excellence assessment which is programmed to take place in June this year

2.4 Benchmarking

For some years now the unit has been an active member of a small benchmarking club along with another 7 local authorities. Members are mainly from within the central belt and meetings are generally held quarterly. The club was originally set up through the auspices of the Scottish Branch of the Association of Chief Estates Officers, and the benchmarking results are made available to this wider audience on request.

A number of previously agreed KPI's are benchmarked on an annual basis to illustrate how each member is performing in relation to the other members of the club – where these are not currently in Covalent they form part of our continuing review of PI's. In addition, a number of processes have been evaluated and a "best practice" methodology established for each.

We have contributed to ACES Performance Management Group, which encompasses both the existing benchmarking arrangements as well as adding a number of new KPI's that are more closely linked to asset management planning objectives.

We have also approached a major, national, private sector industrial landlord with a presence in West Lothian to establish their possible interest in benchmarking, but have not managed to secure their cooperation.

Within Property Services we are able to compare and contrast our performance on both Customer and Employee Satisfaction with colleagues in Construction and Countryside, and ultimately with other council services.

2.5 Civic Centre

PM&D's own move to Civic Centre involved a significant amount of preparatory work in a relatively short space of time, principally the step change that came from the move to a paperless office and the Meridio EDRM system. Teething issues mean this transition has still to be completed.

3. TRANSFORMATIONAL CHANGE – DIRECTION 2010-11

3.1 Objectives 2010/2011

The following summarises the main challenges and targets for the delivery of our five service activities in the coming year:

1. Disposal of surplus property/capital receipts programme

- Our target for capital receipts in the coming year, following the rescheduling agreed with Finance Services, is currently £2.128m. However, we will have to ensure that the 2009/10 shortfall of £417,000 is also achieved. In line with recent practice this target will be reviewed with colleagues in Finance Services early in the financial year..
- Receipts are expected to come from mixed portfolio of small residential and business sites, and achievement of the target is therefore dependent on the strength of these two markets. Attaining this target also depends on the disposal of more, smaller sites than may have been the case in the past. At the time of preparation of the Team Plan there is still no evidence of a return to activity from the major house builders, making it unlikely that we will be putting any of the council's larger sites on the market in the near future. The only potential for income from these sites would appear to be from affordable housing.
- The most recent rescheduling of receipts has set far more challenging targets, totalling c£23.6m, for the three year period from April 2011 to March 2014. This anticipates a recovery from the current economic downturn over the next 12 months, but the situation will be under constant review. The present restrictions on Bank lending will have a significant bearing on our ability to attract buyers, should these constraints continue. In the meantime, we will continue to prepare for this target, by instructing title checks, the preparation of appropriate plans, and by liaising with colleagues in Planning Services on the planning briefs. This preparation will help ensure that our target will be met both in numerical terms and also on time, as soon as the market recovers. The achievement of all targets, however, assumes that there are no other constraints to development, e.g. by restrictions on educational capacities.

2. The management of the council's non-operational portfolio

- a. The management of the council's industrial and commercial property portfolio
 - The revenue target of £4.696m reflects minor accounting adjustments and the growth of income projected in the last round of corporate financial efficiencies.
 - The outturns for recent years represented a closer alignment against targets that had remained consistently high and substantially unaltered since 2000/01, irrespective of the impact of globalisation in the early part of the decade. Apart from the shortfall during 2009/10 as a consequence of the renegotiation of the lease of Almondvale Stadium, to date we have managed to sustain income despite the credit crunch. However, in 2010/11 we are faced with having to replace the loss of c£100,000 from the current rent roll because of the Stadium lease. The next round of financial efficiencies also predicts rental growth of c£166,000 in the two financial years from March 2011. These combined pressures represent a requirement to achieve a minimum of c5% growth by March 2013
 - We will continue the development of a Property Strategy, which will include a full suite of indicators that will demonstrate the performance of the non-operational portfolio
- b. The control of rental arrears
 - We will continue to try and drive down arrears levels to our target levels of 1.5% for historic debt and 4% for current debt, and to achieve this we will implement further process changes in the coming year.
 - In particular, once the appropriate software is in place, the new reporting facility from Tramps will enable a refined analysis of arrears by age, and the action taken – e.g. repayment arrangements; reference to Legal Services etc. We will consider the use of this more detailed report to produce and monitor revised Performance Indicators

3. Professional Services

- a. Rating appeals

- As noted above the Rateable Values for all non-domestic properties are due to change with effect from 1 April 2010. We will manage the council's appeal process to ensure that the council's rates bill is managed effectively.
- b. The valuation of land and property
 - We will complete our regular programme of revaluation of 20% of the council's capital assets, having regard to the changes to the procedures for the valuation of the council's property assets under the IFRS regulations
- c. The granting of wayleaves and servitudes
 - This activity is largely demand led and is usually difficult to predict. As private sector house building is currently at a very low ebb there is a possibility that the demands for this part of our workload may reduce. However, to balance this, demand as a result of the council's own activity – for new schools and council house building – may actually increase.
- d. The maintenance of property records
 - Again, this is a staple part of our workload, which is fundamental to everything else we do, and provides the council with a valuable corporate resource.
- e. The provision of expert advice on property issues.
 - We will continue to supply specialist advice to other stakeholders in the council, representing their interests in landlord and tenant issues where the council leases in properties, and in the form of representation on a variety of specialist working groups e.g. West Lothian Open Space Strategy; and Core Development Area working groups. We will continue to represent other council services in a professional capacity on projects such as landlord and tenant, land acquisition and partnership projects.

4. Industrial and Business Property Development

- With our joint venture partners, we will continue to pursue development opportunities following the completion of the infrastructure at Heartlands Business Park, and will promote the release of development opportunities ahead of the completion of the Riddochhill rehabilitation in the summer of 2011.
- We will pursue the preparation for development of the balance of the Rosebank Nursery site in Kirkton Campus and land at Williamston South, Oakbank to be ready when the market picks up.
- We will continue to work with colleagues in Planning Services on the preparation of the East of Scotland Strategic Development Plan, to ensure that it includes a robust framework for the analysis and allocation of employment land in the next Local Development Plan.
- Working with colleagues in Economic Development will continue to provide an advisory and information service to local and migrant businesses

5. The management of the council's Headquarter buildings, and operational property budgets

For all our Headquarter buildings, and as managers of Civic Centre, our objectives will be to:

- provide an effective and efficient facilities management service for the council (and its partners) within budget constraints
- ensure that all health and safety issues are addressed to ensure a safe working environment for our partners, staff, elected members and visitors
- engage with the occupiers to effectively and efficiently manage the consumption of energy and other resources in all the headquarter building, but focussing on Civic Centre

We will also be assuming responsibility for the efficient budgetary management of a significant proportion of the council's occupational costs for its main operational properties. We will continue to contribute to the implementation of the council's office rationalisation programme.

3.2 Transformational change

The main challenge for the council and all its Services in the coming three financial years is the impact of budget reductions. For PM&D this will be a balance of increased income and expenditure cuts. As our range of service activities does not, currently, look as if it will reduce, we are faced with delivering the same – or in some areas an increased service – with fewer resources. This will include people. We already have two vacant permanent posts, which have been included in

efficiency savings, equating to 12.5% of our office based staff complement. In summary, we will have to deliver:

- Enhanced income
- Cost savings, and
- Streamlined work practices.

In the past three years we have delivered financial efficiencies totalling £353,000 – approximately half through cost savings in both the commercial portfolio and Headquarter buildings, and half through income generation in the commercial portfolio. This total was almost three times that required from PM&D alone – supporting efficiencies for Property services as a whole. There is already an expectation of increased income by March 2013 – which is detailed in section 2 below – and we will investigate the potential to generate additional income from other property sources. We will again examine the Headquarter and commercial property expenditure budgets to find efficiencies.

The reduction in our office based staff from 16 to 14 FTE means we will have to squeeze more out of each working day, and as a Team we have already identified a number of small ways in which we can address this. However, we must be careful that our efforts do not impose additional demands on colleagues in other Services who are also charged with finding efficiencies. Proposed changes to our work practise will be converted into Initiatives and put on the council's database as appropriate.

The reconfiguration of the council's organisational structure will impact on PM&D, as both Property Services, and Development and Environmental Services will cease to exist. The full impact on the current Team structure has still to be finalised.

3.3 Continuous Improvement

We will continue to implement those Initiatives from previous years that remain to be completed, and we will continue to encourage staff participation in both the suggestion of service improvements and their delivery.

We will also continue the review of our Performance Indicators to ensure that our collection and presentation of information on our Performance is consistent with corporate standards and our revised Service Standards.

We will complete the assessment for the Customer Service Excellence standard in June 2010. The Quality and Service Improvement Team meets on a regular, monthly basis to ensure that we devote adequate time and resource to the proper assessment of the service. The Team comprises 6 office based staff (two Managers, three Surveyors, and a Property Assistant) with support provided by the Performance Officer. The composition of the Team was refreshed between our Charter Mark Assessment in 2006 and the WLAM review in 2008, and will be changed again before our next WLAM Assessment. Our objective is that, eventually, all staff will have participated in the Team, both to broaden their experience, and to allow us to draw on their views in the development of the Service.

3.4 Main Initiatives 2010/2011

The principal Initiatives arising from the Transformational change programme are shown in Appendix 12.

Further Initiatives will be introduced once the action plans from the Headquarter Buildings/Civic Centre occupier surveys have been agreed with stakeholders. Our Employee satisfaction survey has lead to changes to our management of the Caretaking staff. Additional Initiatives will follow:

- The detailed assessment of working practices/income generation opportunities (see above)
- Our CSE assessment

3.5 Regulatory change and other challenges.

As noted in the Foreword we are faced with changes to the regulatory framework within which we work. The procedures for the valuation of the council's property assets are to change under the IFRS regulations, and this is expected to change our current obligation to re-value the council's property portfolio on a rolling, 5-yearly basis. It is anticipated that certain classes of asset will now have to be re-valued annually.

Most of our professional staff are members of the RICS, who are promoting regulations for Valuer Accreditation. This may affect who can be involved in aspects of the valuation work we carry out on behalf of the council. We will continue to monitor these proposals, and will also need to keep track of the RICS move towards property management accreditation

4. HOW WE DELIVER THE SERVICE

4.1 Service Standards

The Context and Overview noted that the delivery of our service is governed by our Service Standards. As part of our commitment to continuous improvement, and in consultation with staff, stakeholders and customers, we reviewed our Service Standards during 2009/10. As well as the long established “customer care” standards – which reflect our approach to customers and what they can expect from the way in which we deliver our services – we have now established “core” standards. These tell the customer in more detail what they can expect as the outcomes from each of our activities. Our revised Service Standards are reproduced in Appendix 3.

Consultation with our customers and stakeholders on these revised standards took place in January 2010. We asked if our revised standards were relevant to the service we deliver, and if they were clear and easy to understand. In each case we received a very favourable outcome – 91% of respondents assessing them as Good or Excellent.

Our performance against these Service Standards is a key indicator of how we are doing, and, while we have several established PI's that will demonstrate this, we are developing additional PI's so that performance against each specific Service Standard can be measured, and reported on. These will be included on Covalent.

4.2 Equality And Sustainability

PM&D is committed to equality and fairness in the way we deal with both our customers and our staff. As part of our regular Customer Consultation we run an Equality survey, the results of which are published as part of our Consultation analysis. No criticisms of our service, or suggestions for its improvement, were made by those responding to this survey during 2009/10.

Our general Customer Survey asks respondents to indicate if they consider that we offer fair and equal access to our services. The response in 2009/10 was 100% affirmative.

Similarly, our annual staff survey asks our people for their views on the unit managers commitment to Equal opportunities, and on the commitment to equal access to our services. In each case the weighted outcome was over 75% (a 66% score equates to all respondents giving a “Good” score.)

Our commitment to Sustainability is demonstrated through:

- the design and delivery of our development projects;
- our involvement in energy management; and
- our office practices, e.g. the move to a paperless office and by promoting recycling.

4.3 Customer Focus And Consultation

PM&D works with its customers, partners, stakeholders and other services of the council to deliver its services efficiently and effectively. As an integral part of this process we regularly consult with our customers to ensure that we meet their expectations and needs. Customer feedback is welcomed and we review our services as a result of comments received.

Customers and clients

PM&D provides a service to both internal clients and external customers. A segmentation of our customers is as follows:

Internally, our professional advisory services are available to all council members and Services. Our disposal programme serves the corporate client through the Head of Finance. A significant proportion of the council's staff is our ultimate customer in our role managing the council's Headquarter properties.

Externally, we have a new range of customers in the partner organisations that occupy Civic Centre. The letting and management of the council's non-operational portfolio serves a large proportion of the local business community, particularly small and medium enterprises. For business property development the client base comprises indigenous businesses that require larger premises; and businesses relocating to West Lothian. In each case we will support, and target our activities towards, businesses that create or bring new jobs to West Lothian. We provide a service to the utility companies through the provision of wayleaves and servitudes, and to the local community through ad-hoc property disposals. We provide external (and internal) customers with property ownership information.

Our commitment to customer focus is underpinned by our Customer Care Strategy and complaints procedures

Customer consultation programme

During 2009/10 we reviewed the segmentation of our customer base and refreshed our consultation strategy. Our full programme of consultation – with both internal and external stakeholders and customers – is continuously under review, and our detailed Consultation Schedule is included as Appendix 9.

As well as the routine use of our Customer questionnaire, our focus this year has been on three surveys:

- consultation with customers and stakeholders on our Service Standards;
- a new survey of internal customers for our professional services; and
- the two yearly occupier survey of our Headquarter buildings and Civic Centre.

Our programme of consultation has meant that the latter two surveys have taken place late in the year – the occupier surveys having been delayed until all partners had settled into Civic Centre.

Consultation on our revised Service Standards resulted in 91% satisfaction levels (i.e. scores of “Good” or “Excellent”) for their relevance and clarity.

We received a 100% score (“Good”/“Excellent”) for the quality of our professional advice and information.

Our occupier surveys (Headquarters and Civic Centre) revealed average scores of 81% and 76% respectively in response to questions on the suitability of the buildings. Detailed action points have been developed and agreed with stakeholders.

We have reviewed the method of analysing our survey results on the 5 Drivers of Customer satisfaction, to make them more sensitive. The Overall level of satisfaction is one of our Performance Indicators reported in Appendix 6.

Analysis and reporting

Our WLAM assessment identified that previous survey returns have shown a continued high standard of overall performance, but have often been based on a low level of survey return. As a result we undertook a review of our survey methodology, and amalgamated the response to similar questions in the surveys of different segments of our customer base, to establish a more accurate picture of performance. We have also adopted a weighted analysis of returns, rather than relying solely on the percentage of Good/Excellent answers, as we believe that this provides a more meaningful outcome and sensitive trend analysis where we are faced with a low level of survey return.

The full rationale behind the revised methodology is outlined in our annual report on Consultation, which is included as Appendix 8. This Appendix also contains the detailed results, and trends relating to Customer Satisfaction. Management Performance Indicators are also included in Covalent and are listed in Appendix 6.

4.4 Freedom of Information

The Freedom of Information (Scotland) Act came into force on 1 January 2005. During 2010/2011 PM&D received 14 direct requests for information, and 7 requests to contribute to a response from other Services. We responded to all of these requests within the prescribed time. This figure compares with 17 requests in 2009/2010

4.5 Corporate Governance and Business Risk Assessment

The Code of Corporate Governance, “the system by which local authorities direct and control their functions and relate to their communities”, sets down the fundamental principles of good governance namely openness and inclusivity, integrity and accountability. PM&D maintains its contribution into Property Services checklist for compliance.

A total of twenty one assessed business risks for PM&D are held on the JCAD Risk system. The register is reviewed and updated regularly. The identified risks are detailed below.

Reference	Details
DEP010001	Downturn in rentals
DEP010002	Reduction or delays in capital receipts, and impact on expenditure programme
DEP010003	Asbestos regulations 2002
DEP010004	Contaminated land
DEP010005	Unexpected additional costs of DDA compliance
DEP010006	Legionella in industrial and commercial properties
DEP010008	Lone working
DEP010009	Fire
DEP010010	Damage to properties and loss of income
DEP010011	Vandalism
DEP010012	Loss of critical systems
DEP010013	Error or perceived error in advice given
DEP010016	Failure to comply with terms of ERDF grant
DEP010017	Provision of construction land or business space
DEP010018	Breach of insurance requirements
DEP010019	Loss of critical records
DEP010020	Failure to comply with council’s code of corporate governance on Whistle blowing
DEP010021	Failure to comply with council’s code of corporate governance for the control of fraud and corruption
DEP010022	Failure to comply with EC Directive for the procurement of Construction Contracts
DEP010023	Failure to comply with EC Directive for the procurement of Goods and Services
DEP010024	Lack of up to date Supplementary health and Safety Policy, Safety Arrangements and Procedures

A business contingency plan is in place for PM&D.

4.6 Service Principles

In addition to the commitments embodied in our Service Standards; and our approach to customer consultation, equality and sustainability, the delivery of PM&D’s service is underpinned by a number of other principles:

Working in partnership

As well as providing a professional property service for the use of other council services, PM&D works closely with other council services in delivering its activities:

- With Economic Development we provide information, advice and assistance to new, indigenous, migrant and inward investing businesses; and promote West Lothian as a business location.
- Our development projects require the professional design services provided by Highways and Construction Services, who also work with us on the maintenance of the council's non-operational portfolio and Headquarter buildings.
- With briefs prepared by Planning Services, and transactions concluded by Legal Services, we deliver the councils Capital Programme. Our work on the industrial and business land supply implements the provisions of the Local Plan, and our monitoring of the effective land supply informs the review process of Planning Services, with whom we also work jointly on environmental initiatives.
- We have assisted Development Control in supporting the council's decisions on planning applications at Appeal, defending the supply of sites for business and industry.

External partnerships also contribute to the delivery of PM&D's objectives:

- The delivery of new industrial and business property initiatives seeks to engage partners from the private sector, and Scottish Enterprise.
- Our programme of disposals involves partnership with local developers and Registered Social Landlords
- The use and management of the Civic Centre involves partnership working, principally with Lothian and Borders Police and the Scottish Courts Service

The delivery of our service also demonstrates commitment to:

- **Health and Safety:**
 - a. through raising staff awareness of H&S issues; the establishment of appropriate policies and practices, based on risk assessments; the provision of detailed guidance; and appropriate staff training. Staff awareness of H&S issues is tested through the staff survey. And
 - b. through our commitment to ensuring that Civic Centre and the council's headquarter buildings provide a safe and secure working environment, and comply with current legislative requirements.
- **Social inclusion** and the development of communities – in the focus of our areas of activity, and the objective to support the provision of employment opportunities
- **Developing people** – through Personal Development Planning
- **Excellence and continuous improvement** – through the adoption of the West Lothian Assessment Model; the attainment of Charter Mark and our progress towards Customer Service excellence; benchmarking our performance; and in the projects we deliver, and the methods employed in their delivery
- **Best value** – through our statutory obligation under s74 of the Local Government (Scotland) Act 1973; by optimising the use of the council's resources; and by securing leverage from external partners

4.7 Resources

People Resources

PM&D reports to the Head of Property Services and has an establishment of 21.5 FTE posts. The reporting and staff structures are illustrated in Appendix 2.

It is important to distinguish between the office-based, professional/technical/support staff, and the caretaking staff, whose activities and responsibilities are dissimilar. While representing 5.5 FTE, the caretaking role is actually carried out by a combination of 4 Full time, 2 Part time and 2 contract staff. Three of our office staff are part time and one on a temporary contract, so PM&D actually has 22 staff members. We have one vacancy.

Although regarded as 5.5 FTE posts, it is also important to recognise that there is a significant call on the caretaking staff to cover additional hours-+. There have also been pressures arising from the

requirement for extended opening hours at the new Civic Centre compared to other headquarter buildings.

In common with all Services we undertake regular workforce planning, and the outcome of this years review, together with a report on staffing issues for the past year, is given in Appendix 7.

Previously staff time allocated for each key activity in the forthcoming year has been based on analysis of historic time sheets for each individual member of staff. Based on that experience, it is known that there is a very stable amount of chargeable time in the key activities. That chargeable time (excluding caretakers) is 60% of the total staff time available within PM&D. The balance of staff time covers non-chargeable time such as management time, administration, training, service improvement, holidays etc. We have reviewed and reintroduced our time recording procedures, which, in future, will give a clearer indication of how we spend our time.

Financial resources: Revenue

The detailed revenue budget for PM&D is set out in the table below. The figures are calculated from the budget development prints provided by Finance Services, and show the actual available expenditure in each activity. This means that Capital Financing Charges have been excluded.

In the three years from 2008/09 to 2010/11 all council services have been obliged to identify efficiency savings in their revenue budgets. Over the course of these three years PM&D's share of efficiency savings has been £126,000. In addition, because of the nature of the services provided by our colleagues in Countryside and Construction, PM&D has been asked to identify an additional £227,000 of efficiencies for Property Services as a whole. The total of £353,000 has been delivered through savings in the operating costs of both the commercial portfolio and the Headquarter buildings (c49%) and projected increases in rental income, largely from the commercial portfolio (c51%).

Activity	Staff costs	Revenue Expenditure	Revenue income target
1. Disposal of surplus property/capital receipts	£113,864 (2.25 FTE)		
2. Management of the non-operational portfolio	£331,474 (6.55 FTE)	£1,916,181	£4,596,012
3. Professional Services	£194,835 (3.85 FTE)		£10,362
4. Industrial and business property development	£68,317 (1.35 FTE)		
5. a) Headquarters buildings b) occupational costs	£277,114 (7.5 FTE)	£3,690,522 £4,344,630	£1,407,937
Totals	£985,604 (21.5 FTE)	£9,951,333	£6,014,311

The formal council approach to Activity Based Costing is given in Appendix 12.

Financial resources: Capital

PM&D's future capital budget is extremely limited and continues to decline. The 2010/11 budget is the last time we expect to have access to our own funding for improvements to the commercial portfolio, or development projects. However, in addition to the above PM&D may have an involvement in planned expenditure over the coming ten years on operational properties both leased and owned by the council.

As part of the council's asset management planning process the allocation of capital resources is based on the submission of Strategic Outline Business Cases for funding from the council's ten-year programme. In the past we have submitted bids for development projects and for the maintenance and enhancement of both Headquarter properties and the commercial portfolio, without success. Accordingly we have been obliged to explore alternatives for their provision. We will continue to prepare SOBC's as and when the opportunity arises.

APPENDIX 1 - Scope of Activity

PM&D has five principal service areas, which further subdivide into a number of sub-activities.

1. Disposal of surplus property/capital receipts programme

The primary objective is to maximise receipts from a planned disposal of property assets in order to partially fund the Council's capital expenditure programme. The programme of capital receipts, which is agreed through the Officers Capital Working Group, will contribute towards the council's total expenditure under its 10 year Capital Programme.

A secondary objective is to effect disposal of those assets that are declared surplus from time to time because the council has no further use for them. In addition PM&D will respond to ad-hoc requests for property purchase, e.g. from local businesses for the purchase of industrial development sites, and from local residents for the purchase of amenity ground to include within the curtilage of their houses as extensions to their garden ground.

2. The management of the council's non-operational portfolio

The non-operational (i.e. commercial) portfolio comprises properties owned by the council that are not used for the direct delivery of council services. The main objectives of this service area are to maximise the generation of income to the council, and to maintain the long-term performance of the council's non-operational property portfolio. PM&D seeks to exploit the effective and efficient use of the Council's land and property, and to minimise the costs involved in holding such an extensive portfolio.

This area includes:

- a. The management of the council's industrial and commercial property portfolio (i.e. new lettings, lease renewals, rent reviews, repair and maintenance, etc); and
- b. The control of rental arrears

The generation of revenue income is significant in supporting many of the other aims of the council – allowing expenditure on “frontline” services. West Lothian Council is a major owner of property for business and industry throughout the county, with a portfolio of over 500 premises. These include:

- 70 business starter units suitable for a variety of light industrial and office uses
- Approximately 220 small industrial units from 90 to 180 sq.m (c 1000 to 2000 sq.ft)
- Over 40 larger industrial units of 180 to 3100 sq.m (c2000 to 33000 sq. ft.)
- Office accommodation in multi-storey blocks and modern self-contained buildings
- In excess of 100 shops, principally in local neighbourhoods, but with a few in prime locations

The industrial and commercial portfolio provides a valuable resource that directly supports economic development, and, by generating an annual income, indirectly supports other activities within the council. On behalf of other Services, PM&D also manages a further 250 non-operational properties – as varied as sports facilities, agricultural holdings and restaurants.

3. Professional Services

The provision of a professional advisory service constitutes a significant element of PM&D's work. As with the management of the non-operational portfolio this area seeks to help other services maximise the effective and efficient use of their property. We address corporate property issues, such as the assessment of the council's properties for Non-Domestic rates and the valuation of its property assets.

The services comprise:

- a. Rating valuations and appeals
- b. The valuation of land and property
- c. The granting of wayleaves and servitudes
- d. The maintenance of property records, including the Property Terrier; and
- e. The provision of expert advice on property issues.

Each of the services outlined is generally self-explanatory with the two largest single areas of work being b. and d. The former, the valuation of land and property, includes the re-valuation each year of 20% of the council's property assets for capital accounting purposes. We are also responsible for the

provision of insurance reinstatement values in connection with the disposal of council houses. The latter, the maintenance of property records, requires the constant updating and management of accurate records relating to all of the council's property assets including management of all title deeds and lease documentation for the entire portfolio.

The provision of expert advice includes significant involvement in elements of management of some other operational buildings, particularly Landlord and Tenant issues where properties are held on lease from private landlords. If a council service, which is reviewing its activities, finds that this has implications for its occupation of property, PM&D is involved in advice on the availability and procurement of appropriate space to meet changing service demands. Our service will also involve the acquisition of property to facilitate the delivery of other Services activities, e.g. land acquisition for Highways improvements, new schools, and new cemetery provision.

All non-domestic property in Scotland falls to be re-valued for rating purposes on 1 April 2010. The council's entire property holding will have to be reviewed to identify where there might be opportunities for appeals to be lodged against the new values, ultimately in the expectation of reductions being achieved and therefore the overall council rates bill being reduced. It remains to be seen whether this large volume of additional work will be carried out in house, by a third party, or by a combination of the two.

4. Industrial and Business Property Development

This service area is based on promoting the economic development of West Lothian – we seek to secure a thriving and well-balanced local economy, in a high quality environment. The Strategic Services Committee agreed the principal objective in August 1996:

“To encourage the development of a physical environment which supports the creation and growth of businesses and employment, by ensuring that a range of property is available, or can be provided on demand, to meet the needs of businesses in, or moving to, West Lothian”

This area has three main sub-activities:

- a. Providing serviced land and essential business infrastructure
- b. Providing new and refurbished industrial/business premises ahead of demand,
- c. Providing a specialist property advisory and information service to businesses; and the promotion of West Lothian as a business location

Activities are demand led and concentrate on addressing market failure – we will seek to provide land and premises where supply from other sources fails to meet demand. The focus of activity is on employment generating uses that fall within planning Use Classes 4, 5 and 6. We will seek to ensure the supply of land and premises for industry and business, offering a choice of both location and quality. The nature of most of our work is long term, and delivery of the service is primarily through partnership with external agencies.

The initiation and delivery of projects to support our objectives is based on the following priorities:

- Addressing market failure in the type, size and tenure of property available
- Offering flexibility in terms of tenure, e.g. responding to demand for short term leases and for owner occupation
- Proving the market – through demonstration projects which will then allow others to follow
- The need to have property product available ahead of demand, e.g. when West Lothian is being widely promoted as a business friendly location
- Making it easier for businesses to procure new space
- Supporting new jobs

i.e. where we are providing property our purpose emphasises the needs of the occupier ahead of the requirement to obtain a specific level of financial return.

5. The management of the council's Headquarter buildings, and operational property budgets

The final service area relates to properties occupied by the council for its own purposes. PM&D currently has responsibility for Civic Centre and for the council's other main Headquarter buildings – Lennox House, St David House, Lomond House, the Courthouse, and County Buildings.

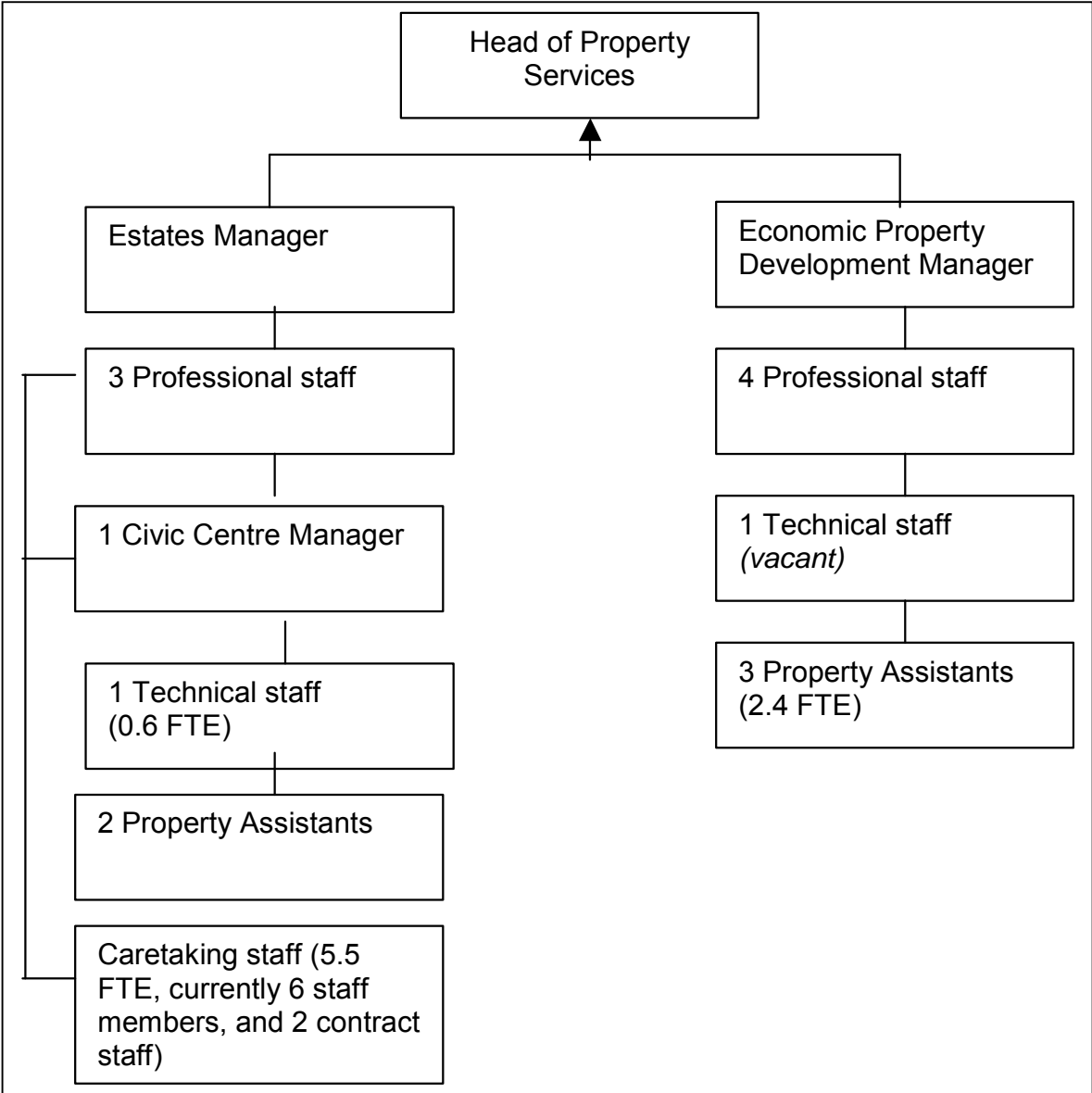
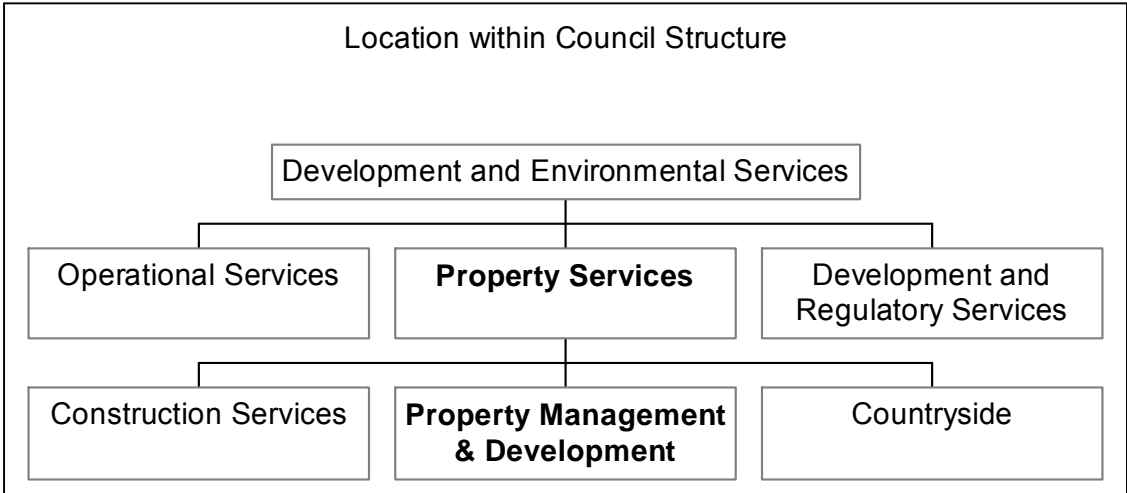
The main objective here is to provide an effective and efficient facilities management function for all occupiers of these buildings (partners, staff, elected members, and visitors) during all normal working hours and also when required outwith these times. e.g. overtime, member's surgeries, special projects etc. This involves many aspects of maintenance, repair, health and safety, fire safety, control of asbestos at work, compliance with disability discrimination legislation, recycling, energy management, etc., and includes representation on corporate working groups to address these issues.

In addition to a dedicated Civic Centre Building Manager, the main resource used to achieve this objective is our caretaking staff who located at Civic Centre and County Buildings, in order to provide an "on the spot" facility. This area of activity has a cost to the council of c£3.97m (including direct staff costs) and PM&D is charged with the provision of this service within the budget allocation.

In addition to the management of the Headquarter buildings PM&D is involved in the review of the future use, possible redevelopment, demolition or disposal of several of those properties that have been, or will be, vacated under the office rationalisation programme.

In accordance with the council's Asset Management Plan, and the move towards budget centralisation, PM&D now has budget management responsibility for the occupational costs for a significant proportion of the council's operational properties.

Appendix 2 – Service and Staff Structure



Appendix 3 – Service Standards

Property Management and Development aims to provide a quality service that is continually improving. To help us achieve this we will:

- Market surplus properties with the benefit of a planning brief or guidance, and in a way that will secure the best terms reasonably obtainable
- Efficiently and effectively manage the council's non-operational (commercial) property portfolio
- Ensure that the council's Headquarter buildings are fit for purpose, providing a safe working environment, accessible for our internal and external customers as required
- Provide an efficient and effective professional service to our internal customers
- Issue lease documents for our industrial properties that are let on a month-to-month basis within five working days of the receipt of a satisfactory application.
- Ensure payment of invoices within 30 days (unless disputed)
- Provide equal and fair access to all our services
- Tailor our services to the needs of our customers
- Deal with all enquiries and problems politely and efficiently, and be prompt and punctual in all contact with our customers. If we are unable to deal with your enquiry at the first point of contact, we will make arrangements for the appropriate member of staff to contact you
- Maintain customer confidentiality at all times
- Communicate with you clearly; keeping you informed of the progress of your request and making sure all our publications and promotional material are comprehensive, accurate and easily understood
- Ensure that our staff are appropriately trained and qualified, and exhibit good professional knowledge in their service area
- Ask you regularly if our service is meeting your needs and how we can improve, acting on the feedback received

We will publish our performance against these standards on www.westlothian.com/pmd

APPENDIX 4 – The Strategic Context

Council mission statement:

"striving for excellence... working with and for our communities"

The council's **values** demonstrate the practices West Lothian Council employees should adopt.

We are striving for excellence in:

- focusing on our customers needs
- being honest, open and accountable
- providing equality of opportunities
- developing employees
- making best use of our resources
- working in partnership

The council's **guiding principles** help us focus on the delivery and development of services....

- a corporate council... focused on our priorities
- a connected council... at the heart of a network of partners
- a customer focused council... organised around the needs of the citizen
- an adaptive council... operating in a responsive positive culture
- a best value council... delivering high quality integrated services
- an e-council... enabled by technology

Single Outcome Agreement 2008

Through our activities providing, and enabling the provision of physical infrastructure and property, PM&D contributes to the following challenges of the Single Outcome Agreement:

Community Plan Theme: A Changing Community

Challenge: Development Challenge

Outcome: All people in West Lothian live in balanced, well-designed, sustainable communities where they can access the high quality amenities and services they need.

Community Plan Theme: A Changing Community

Challenge: Homelessness

Outcome: Fewer people are homeless ...

Community Plan Theme: A Learning Community

Challenge: Educational Attainment and Achievement

Outcome: Everyone's life chances are maximised by improving their educational attainment and achievement.

Community Plan Theme: A Prosperous Community

Challenge: Growing and Strengthening our Economy

Outcome: Our economy is strengthened through an improved range and quality of businesses and increased economic participation..

Corporate Plan 2007 – 2011

The council's Corporate Plan was reviewed by the new political administration in summer 2007, and is based on the following priorities:

- 1 improving opportunities for young people
- 2 making our economy stronger
- 3 improving the health and wellbeing of our communities
- 4 protecting our environment and communities
- 5 planning for population growth, and
- 6 making our services as efficient as possible.

PM&D's activities have particular relevance to priorities 2 and 5, in the areas identified below. In addition, the professional services we provide to other council Services support their activities, and consequently enable the council's delivery of its objectives under the other priorities. Our commitment to continuous improvement means that the delivery of our service is underpinned by the challenges, objectives and aims of priority 6.

Some of the particular aims and objectives of relevance to PM&D include:

- 1 improving opportunities for young people
 - PM&D will contribute to the council's provision of new primary and secondary schools through site assembly
- 2 making our economy stronger
We will:
 - promote the benefits of West Lothian as a place to do business
 - prioritise transport and physical infrastructure projects (roads, railways, schools, lighting, open space, new industrial units and so on) that benefit the economy the most
 - make sure there is an appropriate range of sites and premises available for industry and business
 - lobby to make sure there is effective investment in energy, utilities (for example, water) development sites etc
- 3 improving the health and wellbeing of our communities
 - PM&D contributes to the development of partnership centres in other parts of west Lothian to provide a single, local access point for a range of council and other services
 - we will make sure our public buildings and services are accessible to everyone
- 4 protecting our environment and communities
We will:
 - provide and maintain good quality housing for rent
 - start building new council houses for rent
 - provide three new cemeteries
 - improve the quality of our local environment by making sure we remove unauthorised signs
- 5 planning for population growth
We will:
 - make sure a percentage of the new homes we build are affordable housing
 - provide opportunities for business to develop close to housing
 - work with [other} councils .. to prepare a strategic development plan for the Edinburgh City Region, which will create a vision for how West Lothian should develop up to 2040
 - make 15% of land on residential development sites available for socially rented low cost housing
 - make sure the Bathgate to Airdrie railway line is open again by 2010 ...
 - provide a new motorway junction on the M8 at Whitburn ...
 - work with the private sector to provide a crematorium
 - make sure developers in the core development areas use the waste and empty land at ... Candleworks (east Broxburn)
 - support new developments on waste and empty land at Drumshoreland, Pumpherston, Polkemmet (Whitburn) and Wester Inch (Bathgate)
 - work with developers to make the former colliery site at Riddochhill available for business development
 - make sure, where appropriate, that we maintain and improve listed buildings ...
- 6 making our services as efficient as possible.
We will:
 - produce and maintain appropriate information on all our assets to manage how suitable they are to meet our future and current needs
 - make sure we manage our assets using capital and revenue investment planning with asset management

- make sure we manage and use all assets effectively

The Corporate Plan also includes a section on Financial Planning. This section notes that we have benefited from the sale of land, particularly in Livingston, although “we have nearly used all the money from this source. In its financial challenges and aims the Plan states:

We want to:

- get enough money to continue to be able to deliver good quality services
- link capital investment with asset management
- make sure we maintain our assets to a suitable condition

We will:

- make sure there is a business case for how we spend our money
- produce and keep a corporate asset management plan up to date
- identify assets that we do not need and which can either be sold or got rid of

West Lothian Economic Strategy **Review and Update 2007**

Strategic aims include:

- Increase the number of jobs
- Improve the quality of jobs
- Improve the quality of life

Future Priorities include:

- Attract and support businesses that have growth potential
- Diversify the economy and reduce reliance on small groups of large employers
- Maximise the potential of local SME's
- Promote the benefits of west Lothian as a business location
- Ensure that an adequate supply and mix of business sites and premises are available in the right place at the right time to support business growth

Appendix 5 – Links to National Outcomes and Life Stages outcomes.

	Principal National Outcome served
15	Our public services are high quality, continually improving, efficient and responsive to local people's needs.
	National Outcomes influenced
1	Making West Lothian the most attractive place for doing business in Scotland.
2	Realising our full economic potential with more and better employment opportunities for our people.
3	Our citizens are better educated, more skilled and more successful
9	Our citizens live their lives safe from crime, disorder and danger.
10	We live in well-designed, sustainable places where we are able to access the amenities and services we need.
11	We have strong, resilient and supportive communities where people take responsibility for their own actions and how they affect others.
12	We value and enjoy our built and natural environment and protect it and enhance it for future generations.
14	We reduce the local and global environmental impact of our consumption and production.
	Life Stage Outcomes Influenced
Early Years	children are ready to start nursery and school & parents and carers are responsive to their children's developmental needs
School Age	everyone's life chances are maximised (by improving their educational attainment) to become successful learners, confident individuals, responsible citizens and effective contributors
Young People in Transition	our young people are successful learners, confident individuals, effective citizens and have a positive destination
Adults of Working Age	Every adult has the confidence, skills and ability to secure and sustain employment.
Older People	older people live longer, healthier, more independent and fulfilling lives within a safe and supportive community.

Appendix 6 – Performance Indicators

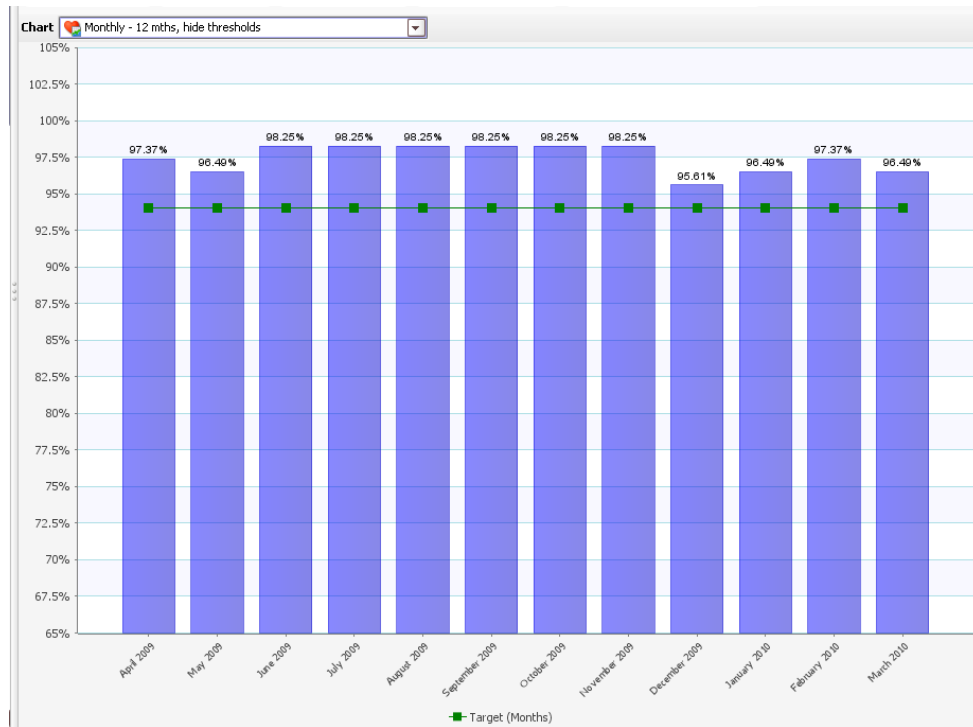
Following our WLAM Assessment in 2009 we have reviewed all our Performance Indicators, to cover all WLAM results categories and to comply with the council's corporate standards.

We have 6 Public Performance Indicators, and the current performance, as reported on Covalent, is as follows:

PMD001 9b.1a	Industrial Portfolio % of Total Units Let																																							
<p>Description: This is one of three PI's that record the occupancy levels of the major parts of the council's non-operational (i.e. commercial) property portfolio. This PI is based on 369 industrial units, the majority of which are let on short term agreements. Targets are reviewed annually in April and take account of the economic climate, the property market, and our rental income target. More details on the council's portfolio can be found on www.westlothian.com/pmd</p>																																								
<table border="1"> <caption>Monthly - 12 mths, hide thresholds</caption> <thead> <tr> <th>Month</th> <th>Actual %</th> <th>Target %</th> </tr> </thead> <tbody> <tr><td>April 2009</td><td>92.41%</td><td>92.00%</td></tr> <tr><td>May 2009</td><td>92.95%</td><td>92.00%</td></tr> <tr><td>June 2009</td><td>91.87%</td><td>92.00%</td></tr> <tr><td>July 2009</td><td>92.68%</td><td>92.00%</td></tr> <tr><td>August 2009</td><td>91.55%</td><td>92.00%</td></tr> <tr><td>September 2009</td><td>91.87%</td><td>92.00%</td></tr> <tr><td>October 2009</td><td>92.15%</td><td>92.00%</td></tr> <tr><td>November 2009</td><td>91.55%</td><td>92.00%</td></tr> <tr><td>December 2009</td><td>89.43%</td><td>92.00%</td></tr> <tr><td>January 2010</td><td>89.43%</td><td>92.00%</td></tr> <tr><td>February 2010</td><td>88.89%</td><td>92.00%</td></tr> <tr><td>March 2010</td><td>90.79%</td><td>92.00%</td></tr> </tbody> </table>		Month	Actual %	Target %	April 2009	92.41%	92.00%	May 2009	92.95%	92.00%	June 2009	91.87%	92.00%	July 2009	92.68%	92.00%	August 2009	91.55%	92.00%	September 2009	91.87%	92.00%	October 2009	92.15%	92.00%	November 2009	91.55%	92.00%	December 2009	89.43%	92.00%	January 2010	89.43%	92.00%	February 2010	88.89%	92.00%	March 2010	90.79%	92.00%
Month	Actual %	Target %																																						
April 2009	92.41%	92.00%																																						
May 2009	92.95%	92.00%																																						
June 2009	91.87%	92.00%																																						
July 2009	92.68%	92.00%																																						
August 2009	91.55%	92.00%																																						
September 2009	91.87%	92.00%																																						
October 2009	92.15%	92.00%																																						
November 2009	91.55%	92.00%																																						
December 2009	89.43%	92.00%																																						
January 2010	89.43%	92.00%																																						
February 2010	88.89%	92.00%																																						
March 2010	90.79%	92.00%																																						
<p>Trend Chart Commentary: The nature of most of the lease agreements - easy-in, easy-out, month to month - means that the occupancy level is particularly volatile. The dip in performance between December and February demonstrates this, although March shows some signs of recovery. In the current economic climate, current performance is acceptable, but is closely monitored.</p>																																								

Description:

This is one of three PI's that record the occupancy levels of the major parts of the council's non-operational (i.e. commercial) property portfolio. This PI is based on 114 shops in 15 settlements throughout West Lothian. Targets are reviewed annually in April and take account of the economic climate, the property market, and our rental income target. More details on the council's portfolio can be found on www.westlothian.com/pmd

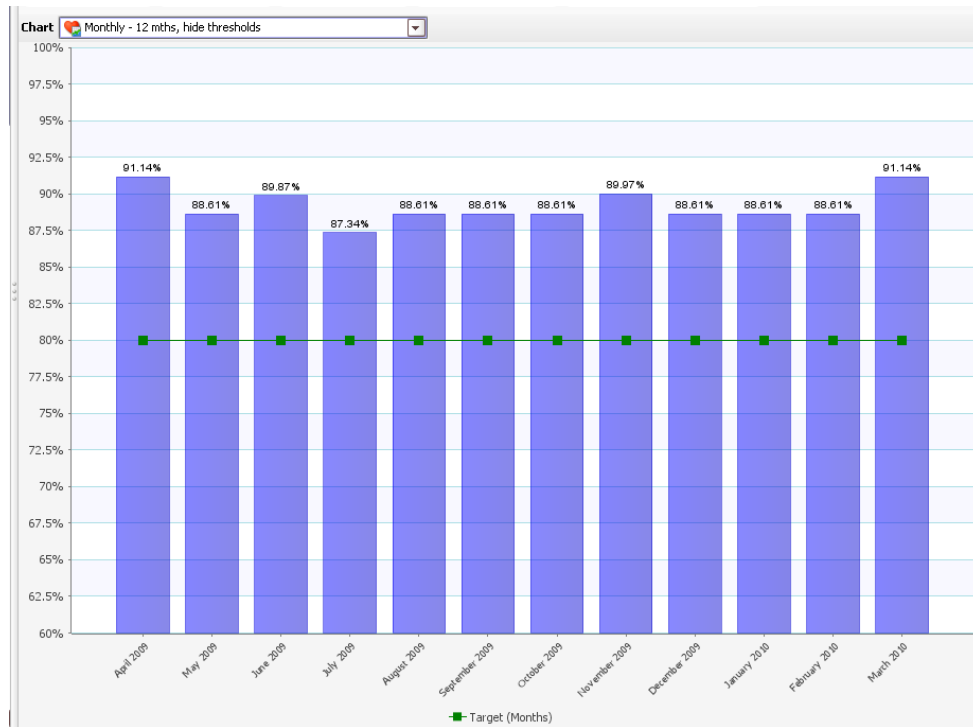


Trend Chart Commentary

Although occupancy levels remain above target they are sensitive to the current economic climate and are being closely monitored.

Description:

This is one of three PI's that record the occupancy levels of the major parts of the council's non-operational (i.e. commercial) property portfolio. This PI is based on 79 self contained offices, or suites in multi-occupancy buildings. Targets are reviewed annually in April and take account of the economic climate, the property market, and our rental income target. More details on the council's portfolio can be found on www.westlothian.com/pmd



Trend Chart Commentary

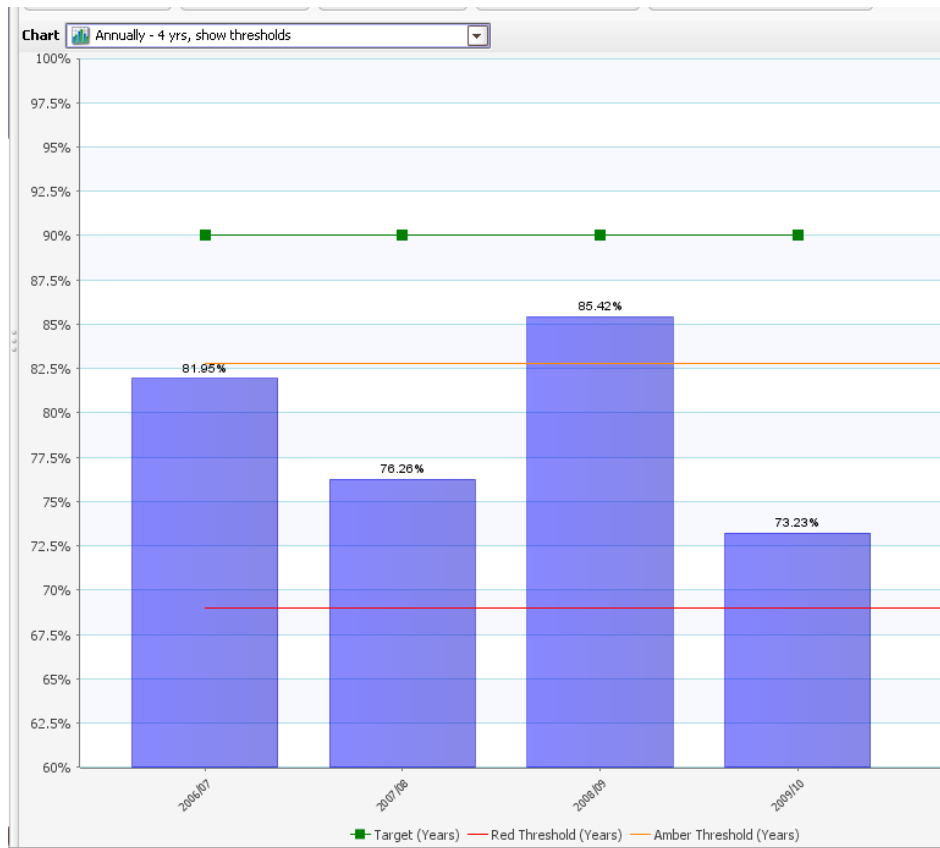
Occupancy levels remain above target, but, in the current economic climate, are being closely monitored.

PMD006 6a.7

Percentage of customers responding to satisfaction surveys who rate Property Management & Development's service as either Good or Excellent

Description:

All PM&D's customer surveys ask about the overall level of satisfaction with the service our customers have received. Results from our annual customer survey, and the surveys of our tenants of the commercial properties; the occupiers of Civic Centre and the Headquarter Buildings; and customers for our professional services, are amalgamated to produce this PI.



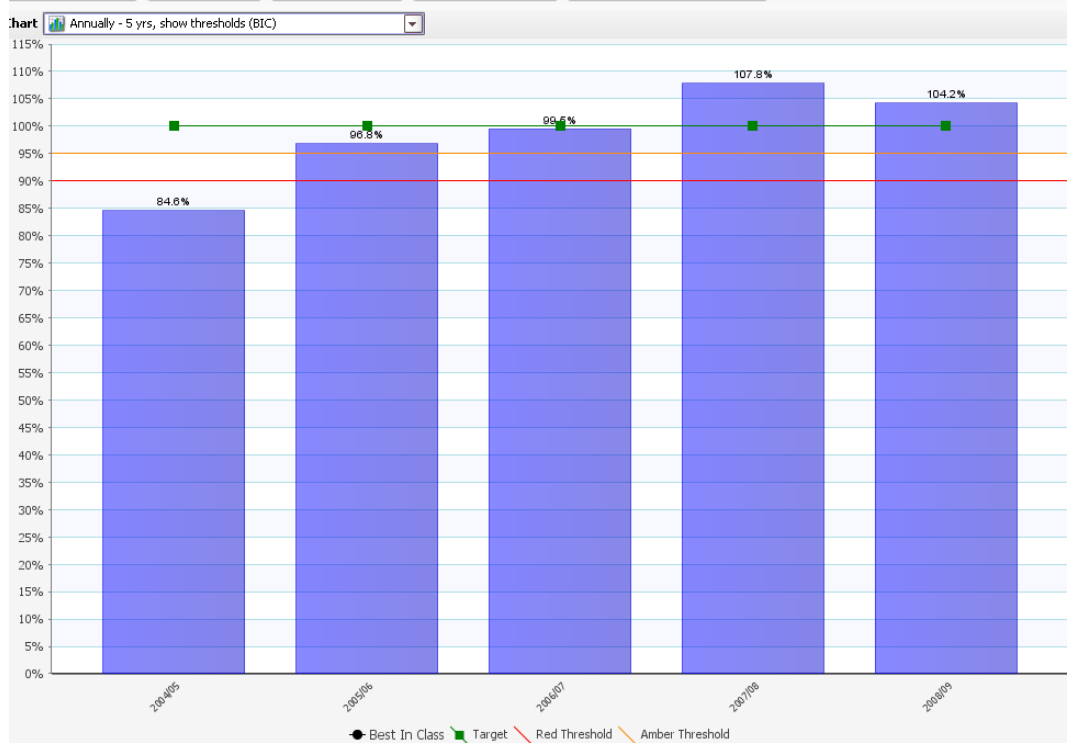
Trend Chart Commentary

Because of low numbers of returns to our regular general customer survey, during 2009 we amalgamated the historic results with those from our Tenant and Headquarter Building occupier surveys, which run in alternate years. Trends are therefore best looked at on a two yearly basis. Results for 2010 also include the survey of occupiers in Civic Centre. We had anticipated that, because of the relatively short time the building has been in operation and the teething problems that have emerged, there would be an adverse impact on our customer satisfaction levels. Although results are below our original target of 90%, the target has been kept at that level. This will ensure that we are still challenging ourselves to improve.

Description:

Rental income comes from the council's non-operational (i.e. commercial) property portfolio. The commercial portfolio totals 690 properties, including 114 shops, 79 offices, 369 industrial units and 37 ground leases. A target rental income is agreed with Finance Services each April, for the coming year. It will reflect the actual income received the previous year and potential increases from rent reviews and new lettings. The PI expresses our final income total for each year as a percentage of the target.

NB – As final outturn figures are not yet available for 2009/10 the information on this PI is based on the financial year to March 2009. Our current projection is that we will achieve 97.4% of our target



Trend Chart Commentary

Our objective is to achieve, and if possible, exceed the target for the year, generating more income for the council. The PI demonstrates that we have been consistently close to, or have exceeded our target income.

Description:

The council has a programme of property sales, the proceeds of which help to fund its capital expenditure programme. An annual target for sales income is agreed in April, for the coming year. This PI expresses our final sales income as a percentage of that target.

**Trend Chart Commentary**

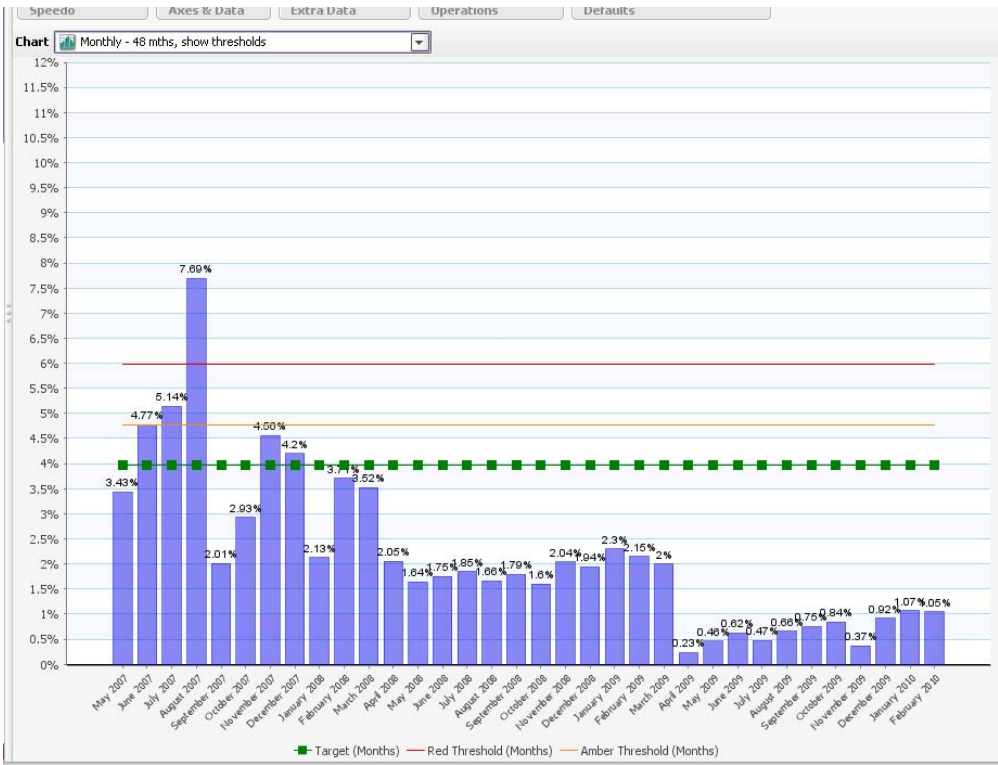
Targets for capital receipts are agreed with Finance Services for each financial year. Our objective is to achieve, and if possible, exceed the target for the year, generating more income for the council. Most sales will only be concluded, and the sale price received, when the purchaser receives planning consent. During 2007/08 the failure of one purchaser to secure a planning consent for a large housing development, which had been expected to provide the council with income before 31 March, meant that we failed to meet our target. In 2009/2010 our target comprised a large number of small sales, reflecting the current economic climate. It again proved difficult to secure purchasers for all identified sales, and we fell slightly short of our target.

In addition to our Public Performance Indicators, previous Management Plans have reported on both our sickness absence levels, and the level of rent arrears.

PMD004 7b %age Sickness/Absence levels - Property Management & Development

Description:

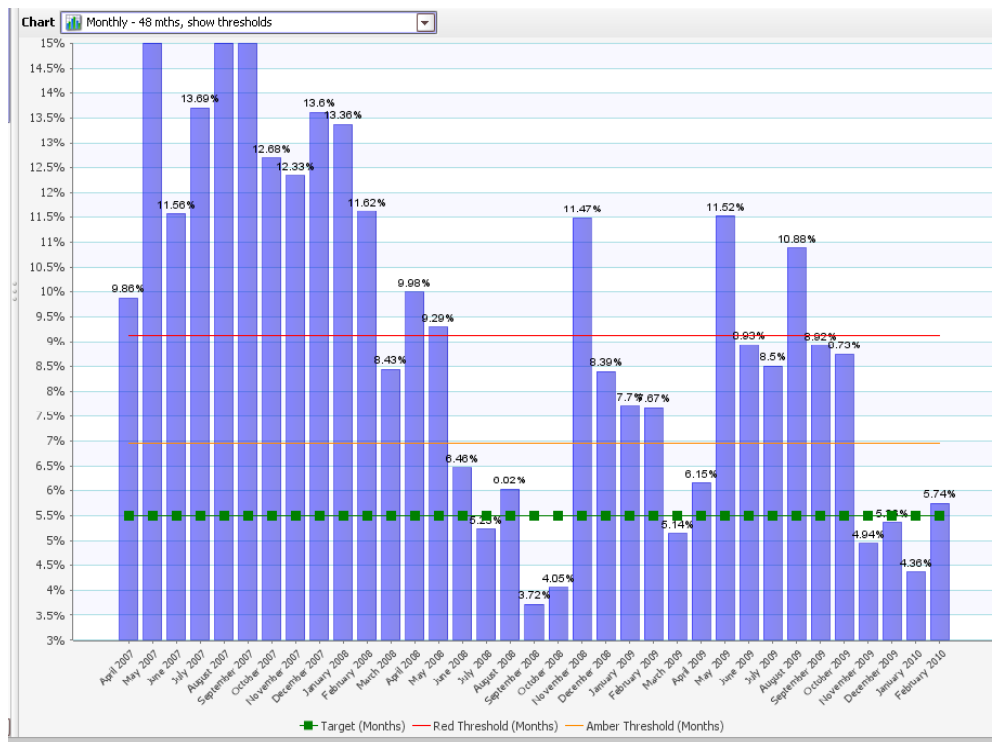
Sickness/absence levels - PMD - previously reported separately as Estates Management and Economic Property Development, although these 2 service units were merged and became Property Management & Development as from Jan 05. Payroll system amended to produce one statistic covering full service unit.



Trend Chart Commentary

Description:

This PI measures the amount of outstanding rent from the council's non-operational (i.e. commercial) property portfolio, as a percentage of the total rental income billed. The commercial portfolio totals 690 properties, including 114 shops, 79 offices, 369 industrial units and 37 ground leases. The current calculation of the PI is based on all income due, even if it has only become due the previous day, less any credits held. The data generally reflects the cyclical nature of rents charged. We are currently reviewing the PI, to produce more accurate figures for aged debt (i.e. >30 days), that can be benchmarked. The new PI is expected to be in place in April. Targets have been set in consultation with our benchmarking partners in other councils.



Trend Chart Commentary:

The graph shows a quarterly cycle because of the structure of lease payments under many of the leases, and the trend should be looked at on a quarterly basis. From May to October the percentage has been affected by a single debt of approximately one third of the total outstanding. This single debt has now been written off, accounting for the change from October to November, but the recent increase reflects six monthly charges that became due at the end of February. When the single debt is discounted the underlying trend is improving, but this has been masked because of the size of the debt.

Covalent includes a further 32 Core and Management PI's – mostly relating to aspects of Customer and Employee satisfaction. We are also developing further detailed PI's, principally to ensure that we are measuring and reporting on our performance against our revised Service Standards.

Public Performance Indicators

<i>PMD001 9b.1a</i>	Industrial Portfolio % of Total Units Let
<i>PMD002 9b.1a</i>	Retail Portfolio % of Total Shops Let
<i>PMD003 9b.1a</i>	Office Portfolio - % of Office Units Let ..
<i>PMD006 6a.7</i>	Percentage of customers responding to satisfaction surveys who rate Property Management & Development's service as either Good or Excellent
<i>PMD032 9b.2a</i>	Percentage of commercial property revenue income against target
<i>PMD033 9b.2a</i>	Capital receipt income against target

In addition to our Public Performance Indicators, previous Management Plans have reported on both our sickness absence levels, and the level of rent arrears.

<i>PMD004 7b</i>	%age Sickness/Absence levels - Property Management & Development
<i>PMD005 9a</i>	Commercial Property, percentage of rent outstanding

In addition to the above the following PI's currently appear on Covalent

6 - CUSTOMER RESULTS	
6a Satisfaction and Experience	% of respondents who:
	<i>CORE PI's</i>
6a.1	rated the timeliness of response as good or excellent
6a.2	rated the service delivered as good or excellent
6a.3	rated the service's performance in keeping them informed as good or excellent
6a.4	rated the staffs' attitude as good or excellent
6a.5	rated the staffs' professionalism / knowledge as good or excellent
6a.6	consider that they were treated fairly
6a.7	rated the overall quality as good or excellent
	<i>MANAGEMENT PI's</i>
6a.8	rated the service's ability to resolve their issue at first point of contact as good or excellent
6a.9	rated the service's handling of problems that arose as good or excellent
6a.10/11	rated the service's accuracy of information; and how comprehensive the service's information was as good or excellent
6a	rated how easy it was to contact us as good or excellent
6a	rated our speed in returning telephone calls and replying to letters and emails as good or excellent
6a	rated our punctuality when attending meetings as good or excellent
6a	rated our promptness in processing documentation as good or excellent
6a	rated our ability to give information on other relevant council services as good or excellent
6a	rated our explanation of terms and obligations contained in our documentation as good or excellent
6a	rated the clarity of our published and promotional material as good or excellent
6a	rated how courteous our staff were as good or excellent

6a	rated how helpful our staff were as good or excellent
	Results are also recorded "weighted"
6b Internal measures	
	<i>CORE PI's</i>
6b.1	Number of upheld complaints received against service delivery

7 - PEOPLE RESULTS	
7a.1 Employee Satisfaction	
	<i>CORE PI's</i>
7a.1	Workforce planning
7a.2	Reward and recognition
7a.3	Leadership and management
7a.4	Involvement and empowerment
7a.5	Team work
7a.6	Learning and development / Performance review
7a.7	Equality and diversity
	<i>MANAGEMENT PI's</i>
7a	Communication
7a	Understanding
7a	Health, Safety and Wellbeing
7a	Service delivery
	PI's on covalent are based on Good/Excellent scores – weighted scores used as management PI's are also available
7b.2 Motivation & Involvement	
	<i>CORE PI's</i>
7b.2a	Response rate to People survey(s)
	<i>MANAGEMENT PI's</i>
7b.2b	PRPDP completion

The following PI's are under development or consideration:

6 - CUSTOMER RESULTS	
6a Satisfaction and Experience	
	<i>MANAGEMENT PI's</i>
6a.12	% of respondents who rated the published standards was as good or excellent

6b Customer Results – Internal measures		
	<i>CORE PI's</i>	
6b.2	Performance against Service Standards	Based on Invoices paid within 30 days
6b.3	Performance against service standards relating to customer service	Based on industrial missives issued within 5 days
	<i>MANAGEMENT PI's</i>	
6b.4	Number of complaints against service policy	

8 – COMMUNITY RESULTS	
8b.3 Voluntary work	
	<i>MANAGEMENT PI's</i>
8b.3b	Amount of charitable donations

9 - KEY PERFORMANCE RESULTS	
9a.1 Efficiency: Money	
	<i>CORE PI's</i>
9a.1c	Unit cost per customer engaged

ADDITIONAL MANAGEMENT PI's	
Corporate Asset Management	Financial performance of commercial portfolio
Return on capital	
Year on year increase in capital value	
Year on year growth in rental income	
Rent collected	
Core Service Standards	
% of surplus properties marketed with a planning brief or guidance	
% of surplus properties marketed with a closing date	
Admin building customer satisfaction with the way we manage the buildings	
Admin buildings - compliance with statutory obligations	
Admin buildings days buildings unavailable for use.	
Number of properties managed per staff member	
Internal Customer satisfaction with Professional services	

Appendix 7 – Workforce Planning

Review – 2009/2010

During the past year changes to our staff complement have been relatively minor. We were able to cover the resignation of one of our Property Assistants by continuing the temporary contract of a PA who had been taken on, initially, to deal with title scanning and subsequently retained as maternity cover. In August we welcomed back the PA who had been on maternity leave. During the course of the year we had a single vacancy for a Technical Assistant, which we had been unable to fill previously. We have continued to employ an agency member of staff to assist with the transition to Civic Centre, and the management of the construction contract. There has been one retirement – a FMA at County Buildings.

The move to Civic Centre, and the council's office rationalisation programme, have meant a reorganisation of the FMA cover. Having moved four FMA's from Livingston and Bathgate properties to cover Civic Centre, we still have two part time FMA's at County Building. The remaining properties at Livingston and Bathgate are covered by contract staff.

In the early part of the coming year we will lose our agency staff member, and have to plan to cover his work at least until the end of the defects liability period for Civic Centre in the autumn. We are also losing another PA on maternity cover and are attempting to recruit a temporary replacement.

Our office based staff complement remains at 16 FTE – with one post vacant, and another filled on a temporary basis until March 2011. Three staff members cover 2 FTE posts.

Performance, Recruitment and Retention

As noted previously our staffing complement over the year has remained generally steady.

Over the last few years the average length of service has dropped from c16 to c12 years. The loss of experienced staff means that we have to ensure that their replacements are quickly familiarised both with the council's activities and processes, and with the geography of West Lothian. We have reviewed our induction procedures to help achieve this. We recognise that career progression for qualified staff is limited, but our ability to alter this position is equally limited. However, we have arranged some learning and development activity to spread modules from the Leadership Development programme, for the benefit of our professional staff

Sickness absence during 2009/10 was 0.74% compared with 1.89% the previous year and Property Services' target for sickness absence of 3.97%.

We continue to respond to individual circumstances by offering condensed working hours where these can be accommodated within the exigencies of the service.

Potential Changes to Service Delivery

The main issue for the year ahead is to plan for the reduction in staff complement to 14FTE, as a direct consequence for of the council's efficiency programme. As well as being unable to fill the Technicians post, the temporary contract for a PA will end in March. As our work programme does not look as if it will reduce, during the course of the coming year we will have to improve the way we deliver our services – achieving, at least, the same outputs with fewer staff.

The council's structural reorganisation will also see Property Services disbanded. At the time of writing PM&D appears to be heading to Finance Services, although parts of our team could be destined for other Service areas. It is also possible that parts of the Asset Management team will join PM&D in Finance. We will endeavour to manage any changes with the minimum of disruption to service delivery.

As a direct consequence of the restructuring we have started to plan further ahead. An ageing management team means that there is an opportunity to look at the shape and structure of PM&D over the next 5 years. We have already engaged with staff, to start the process, but much will depend on the scope of work and responsibilities that will be determined by the restructuring.

Performance Review and Personal Development Planning

PM&D is committed to PRPDP. During the past few years we have supported two of our technicians through the academic qualification for the Royal Institution of Chartered Surveyors, and both have now become full members of the RICS and successfully applied for and obtained promotion to vacant posts within the unit against external competition. We have also supported two members of staff through the qualification to produce Energy Performance certificates.

Following the reconfiguration of the Property Assistants workload, over a number of years, we continue to monitor their progress and need for dedicated training. Our professional staff are also supported in achieving their CPD requirements by the provision of a programme of lunchtime seminars.

Our consideration of the shape of the team in the next few years means that we will also look to succession planning. We will look to extend the provision of the workshops that formed part of the Leadership development programme, by exploring whether modules from the Managers Passport may also be provided in "Bite sized" form.

Health and Safety

During the past year revised risk assessments have been produced following the move to Civic Centre. The coming year will see a further review of our supplementary guidance.

Staff Survey

We have recently completed a sixth survey of the professional, technical and support staff to gauge their views on a variety of issues. This years survey again followed the corporate model, ensuring that we continue to secure feedback on issues that had been raised by the team during previous surveys, and are able to compare trends year on year. We have again sought to analyse responses from office based, and FMA staff separately.

For office based staff there was a dip in performance across most of the categories of question – part of which may be down to the move to Civic Centre, part due to uncertainties because of the drive for efficiencies. Nevertheless the results were reasonably good. As in previous years we have sought the involvement of staff members in identifying and delivering any actions that will improve PM&D's performance.

The results for the caretaking staff were unsatisfactory because there was a reluctance to complete the survey. It is fair to say that we have not satisfactorily addresses issues raised in previous years – and we have already met with the Civic Centre FMA's to try to move this forward. The Civic Centre Building Manager will play a key role in securing improvements.

Appendix 8 – Previous Service Initiatives – Current status

Ref.	Improvement Initiative	Desired Outcome	Current status
427	Revision of Best Practice Notes	Completion of a full suite of Best Practice Notes deployed to staff	Completed – Most Best Practice Notes updated, but a more comprehensive review, looking at the scope of BPN's has been agreed. See Initiative 3632 .
1066	Provision of corporate property enquiry tracking system	Corporate database in place to allow access to information to all services fielding enquiries for available property	Abandoned – No suitable software identified. Requirement to be reviewed with Economic Development
2928	Review and rationalization of filing system	Streamlined and efficient paper and electronic filing	Completed – PM&D now virtually paperless and using Meridio EDRM system
2932	Development of a Property Strategy	A full suite of policies, practices, targets and outputs for the council's portfolio	Completed – Policies/Practices paper approved by Executive. PI's being revised – some in place. Superseded by Initiative 3746
3172	Produce a revised set of Performance Indicators for PM&D's handling of rent arrears	PI's to reflect the age of debt and action being taken	Ongoing – revised PI's ready subject to software needed to support Tramps being upgraded. Expected by April 2010
3173	Produce Performance Indicators to measure the operational performance of the non-operational portfolio	PI to allow the comparison of performance against other investments	Completed – Superseded by Initiatives 3745 and 3746
3418	Ensuring an appropriate and adequate range of sites and premises are available for business and industry. (Corporate Plan “we will ...”	A supply of serviced development land to meet demand from business and industry	Ongoing – through involvement in Heartlands, Riddochhill, discussion on the future of SE's assets, and preparation of the Strategic Development Plan

3528	Incorporate a condition in all new leases on council land which prohibits the growing of GM crops in accordance with the decision of the PP&R Committee in December 2003 (Corporate Plan “we will ...”	A prohibition of production of GM crops on council land	Ongoing – Standard clause already in all cropping leases in accordance with long established policies and practices. Investigating potential to include obligation in existing long-term leases by agreement.
3625	We will review our customer base: <ul style="list-style-type: none"> ▪ to agree a segmentation of customer groups, the appropriate methods of consultation, and the questions asked; and ▪ to assess whether there are customers or potential customers who may be hard to reach and how to reach them 	A more focused and responsive approach to customer consultation	Completed – segmentation reviewed by Quality team, and applied in revised Consultation schedule. Review of hard to reach customers carried out in cooperation with Economic Development
3626	Given the low level of returns to our customer survey we will review how to analyse and report on customer satisfaction results, to aggregate results from segmented groups, if appropriate, to present a more meaningful outcome, and to enable a more appropriate review of targets	Greater sensitivity in customer satisfaction results	Completed – Historic customer survey results amalgamated, and results weighted to provide more sensitive analysis of trends. Targets reviewed following analysis of weighted results
3627	We will review our customer standards, and prepare core standards to ensure we can report on measurable outcomes; consult with our stakeholders on their suitability; and review how our standards are published and distributed	A revised set of service standards	Completed – Revised standards agreed, consultation complete, standards being published
3628	We will review and revise our customer care strategy and complaints procedures, including the publishing of results, the recording and assessment of staff response, and the methodology for reviewing PM&D’s handling of complaints	A refreshed strategy and procedure	Completed – Revised documents completed

3629	We will engage with the FMA's in preparing for the service they are required to deliver for the council and its partners in Civic Centre; including establishing better lines of communication with managers; and appropriate training, particularly on conflict management	An efficient and effective service to customers in Civic Centre	Ongoing – action needed will be reviewed following current staff survey and coming PRPDP reviews
3630	We will set and publicise fee levels, where appropriate, for the services we provide to customers	A clear indication of the cost to customers	Completed – Fees set and being published
3631	We will carry out a full review of PM&D's Performance Indicators, covering all WLAM results categories, to ensure compliance with the council's corporate standards	A comprehensive set of PI's	Ongoing – Revised PI's agreed in accordance with corporate standards. Majority now on Covalent. Data being collated prior to completion.
3632	The full scope and content of our Best Practice Notes will be reviewed	Comprehensive and relevant guidance for staff	Ongoing – Implementation deferred pending completion of other Initiatives
3633	To put in place a process for the letting and management of roundabout advertising, with colleagues in D&R	A procedure for maximising advertising income	Completed – Procedures in place. New opportunities being pursued
3634	We will review the energy consumption in the remaining Headquarter Buildings, assessing any action needed, and set a base for analysing consumption in new buildings	A full assessment of energy consumption in the HQ buildings	Ongoing – Office rationalisation and staff moves mean base figures for consumption have still to be collated
3746	Establish a detailed strategic review framework against which to measure all aspects of performance of the commercial (i.e non operational) portfolio having regard to the purpose for which the property is held, including return on capital.	Strategic review framework completed	Ongoing – draft review framework in place and being developed
3747	Establish a performance indicator that measures the percentage of surplus properties sold following exposure to competitive offers on the open market	Performance indicator created that measures the percentage of surplus properties sold following exposure to competitive offers on the open market	Ongoing - Historic data being collected prior to input on Covalent

3748	Establish a performance indicator which measures the percentage of surplus properties which are marketed with an approved planning brief or other appropriate planning advice	Performance indicator created that measures the percentage of surplus properties which are marketed with an approved planning brief or other appropriate planning advice	Ongoing - Historic data being collected prior to input on Covalent
3749	Establish a performance indicator which measures capital receipts received in each financial year against target set in PM&D Management Plan	Performance indicator created which measures capital receipts received in each financial year against target set in PM&D Management Plan	Completed – PI now on Covalent

Appendix 9 – Customer Consultation Methods – Analysis and Programme

Target Group	Method	Date Undertaken	Analysis Date	Feedback method	Consultation Effective	Actions to improve consultation	Next Programmed consultation
All Customers	Customer satisfaction questionnaire	Ongoing with annual analysis	Annually in March	<ul style="list-style-type: none"> • Service Plan • Internet • Results sent to respondents who requested feedback 	Yes – but low numbers may mean analysis is combined with other surveys in future to be statistically meaningful	<ul style="list-style-type: none"> • Continue to improve distribution – e.g. broaden availability of link to Survey Monkey (letter footers; service standards leaflet; mail shot?) 	Ongoing
All tenants of non-operational portfolio	Tenant Survey	October 2008	March 2009	<ul style="list-style-type: none"> • Service Plan • Internet • Results sent to respondents who requested feedback • Specific issues raised by tenants on security to be addressed by property managers • Letter with bullet points on outcome and referring to Internet page to be sent with May invoices 	Yes – but low numbers may mean analysis is combined with other surveys in future to be statistically meaningful	<ul style="list-style-type: none"> • Revise questionnaire in response to comments and experience from 2008 • Consider most appropriate follow up for teasing out specific issues • Consider feedback through newsletter 	October 2010 – and every 2 years

All Customers	Equality questionnaire	Ongoing with annual analysis	Annually in March	<ul style="list-style-type: none"> • Service Plan • Internet 	Yes	None	Ongoing
Garden ground customers	Customer satisfaction questionnaire	April 2006 to March 2007	March 2007	<ul style="list-style-type: none"> • Absorbed into customer questionnaire analysis because of low return 	No	N/A	Discontinued
All Customers	Consultation on Service Standards	October 2006	November 2006	<ul style="list-style-type: none"> • Service Plan • Internet 	Yes	N/A	Summer 2009 and every 2 years
HQ building users	Customer satisfaction questionnaire	October 2007	March 2008	<ul style="list-style-type: none"> • Service Plan • Internet • Link to be emailed to all staff originally circulated • Synopsis on office notice boards 	Yes	<ul style="list-style-type: none"> • Improved email lists for main buildings 	November 2009 (following Civic Centre move) and every 2 years
HQ building users	Focus Group (BUG's)	Ongoing		<ul style="list-style-type: none"> • Minutes of meetings 	Yes	<ul style="list-style-type: none"> • Encourage more participation • Review frequency • Establish new user group for Civic Centre, Lomond, Courthouse 	Ongoing

All Customers	Internet and intranet content survey	August 2007	September 2007	<ul style="list-style-type: none"> None given, to be followed up in a subsequent survey to make sure that sites have included information suggested 	Yes	N/A	To follow full operation of intranet site
Internal Customers of Professional Services	Customer Satisfaction questionnaire	To start January 2010	March 2010	<ul style="list-style-type: none"> Service Plan Internet Results sent to respondents 	TBC	TBC	January 2010
Targeted client groups (House builders; agents; business community)	Focus Group	Periodic		<ul style="list-style-type: none"> Meeting notes and minutes circulated 	Yes	<ul style="list-style-type: none"> Possible consideration of programme of Focus Groups – even over a prolonged period 	Agents on Local Plan outcome (subject to credit crunch)

Appendix 10 – Customer consultation review 2009 - 2010

Property Management and Development works with its customers, partners, stakeholders and other services of the council to deliver its services in the best way possible. As an integral part of this process we regularly consult with our customers to ensure that we meet their expectations and needs. Customer feedback is welcomed and we will review our services as a result of comments received.

This document outlines our activity during 2009/2010 in formally consulting our customers, and also reports on the comments and complaints we have received during the year.

Segmentation and consultation programme

As a result of our 2008/09 WLAM Assessment we have continued to develop and extend our programme of customer surveys. Our revised consultation programme is included as Appendix 9. In autumn 2007 we had carried out our first survey of those customers who occupy the Headquarter buildings – a survey we planned to carry out every second year, alternating with our Tenant survey. The move to the Civic Centre meant that our customer base had altered and expanded – now including employees from six partner organisations as well as WLC. Because of the phasing of moves to Civic Centre, which weren't completed until November, we delayed our survey until the spring, by which time our customers had had at least 3 months in the new building.

The two yearly pattern, alternating the Tenant and Occupier surveys, is driven by a number of factors. For a small team, it is more resource efficient for PM&D to focus on a different segment of our customer base each year. (We have over 700 tenants and 1300 occupiers – so the numbers are more manageable on a two-yearly pattern). It also allows us to focus on the outputs and actions from a single major survey each year, rather than trying to deliver two sets of service improvements. We also hope to avoid survey fatigue among our customers by going back to them every other year. Our contact with these customer groups is continuous, and this day-to-day involvement allows us to develop customer insight and implement change on a continual basis, rather than simply relying on survey outcomes.

The review of the segmentation of our customer base carried out by our Quality team at the time of our WLAM assessment (Dec 08/Jan 09) also identified a final customer group whose opinions we needed to take – i.e. our internal customers for our professional property services. The first survey of those customers also took place in February 2010.

Review of method of analysis

As a result of our WLAM assessment we had agreed to carry out a review of the methods by which results are analysed, and the way they are presented. This was driven by the historically low levels of participation in our generic customer survey, which runs through the course of each year. It was felt that the number of returns meant that the analysis was not really statistically significant and reporting performance based on this survey alone – which had been the case in previous years – was not particularly robust.

While each of our customer surveys is different – and is designed to inform customer insight by eliciting information and opinions specifically relevant to the target segment of our customer base – they all contain common questions relating to our performance against the 5 Drivers of customer satisfaction, which form the basis of our customer Service Standards. (Delivery, Timeliness, Professionalism, Information and Staff Attitude)

It was agreed that we would amalgamate the results of these questions from all surveys in our report and analysis of results for future years.

Of the 18 questions on the 5 Drivers, eight had formed part of PM&D's generic customer survey for at least 10 years. The remainder had been included since our surveys were revised in 2007/2008, following our earlier WLAM and Charter Mark assessments. So while we were able to carry out a retrospective amalgamation of results from earlier years, and can demonstrate four years results and

three years trends for eight questions, the balance of results are only currently available for two years.

The amalgamation and re-analysis of customer results also introduced a variation in the way by which results are calculated. The council's standard practice is to present the percentage of "Good" and "Excellent" scores. However, this is not particularly sensitive – a service scoring 50% "Excellent", and 50% "Adequate" will actually have the same overall result as one scoring 50% "Good" and 50% "Poor", where the latter is clearly a lower standard. As part of the retrospective amalgamation of results we introduced a weighting, as had been used in our staff survey results. While our Public Performance/WLAM level Performance Indicators remain based on Good/Excellent, we have a parallel set of weighted results, which are also on Covalent, as Management PI's. We believe these are more sensitive to variations in performance and we place more emphasis on them in assessing what action to take. In this context it is pertinent to note that a weighted score of 66% equates to all customers considering your service to be "Good".

Target setting

At the start of the year the Quality team reviewed the amalgamated results for 2009, and set challenging targets – for both "Good/Excellent" and weighted results – based on performance during that year. It is now evident that a two-year pattern of trends is beginning to emerge. This appears to relate to the cyclical nature of our consultation – alternating the tenant and headquarter building surveys. To compare like with like we should really look at trends based on alternate years. Unfortunately these detailed trends will only become apparent in a few years time, as our now more sophisticated and comprehensive programme of consultation beds in. It is, however, our aim to have these results converge through time.

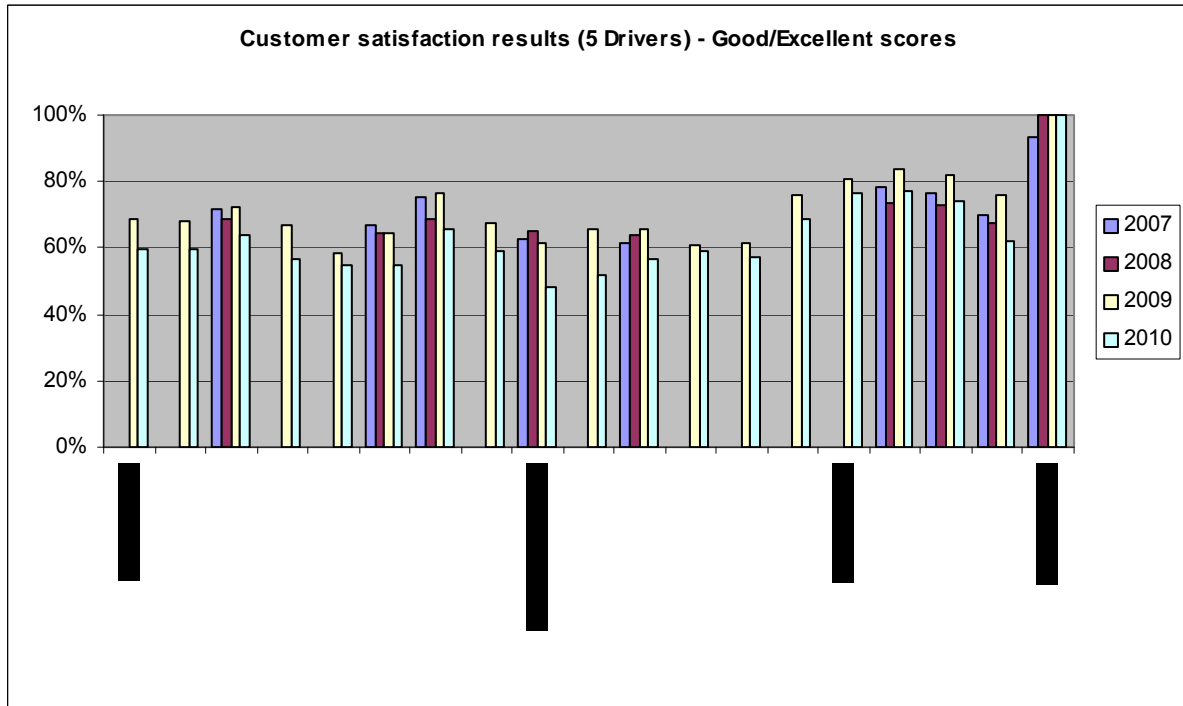
As noted above the Headquarter building survey was broadened this year to embrace customers in Civic Centre. Although it was anticipated that results might be adversely affected because staff were only just settling into the building – and we had been aware of a degree of resistance to the move – our intention to run the survey was discussed and agreed with the Chief Executive and our Civic Centre partners. The results will give us important feedback on teething issues that we hope we will be able to address and resolve fairly quickly – improving future performance for our customers. The results will also provide a useful base for when the survey is run again towards the end of 2011.

In some respects the Headquarter building survey – which reaches our internal customers in other council buildings – is similarly affected. This is because Lomond House, which has recently been the subject of staff moves, is now included in the distribution.

There is no doubt that the outcome of the surveys reflects our earlier concerns. All results for the 5 Drivers are below the ambitious targets we had set, based on a year that included a Tenant survey. However, where we are able to compare results with those for a year including a Headquarter building survey the difference in performance is less marked. The Quality team will review whether we should be amending our targets, to reflect a two yearly cycle, although, as noted above it is our aim and expectation that the results will converge over time.

1. Performance against Customer Service Standards (5 Drivers)

The chart shows the amalgamated results for our performance against the 18 questions, which are based on the 5 Drivers and our customer Service Standards. Results show the percentage of customers rating our service as "Good" or "Excellent" – and results for 2010 combine the figures from our Customer, Professional Services, Civic Centre and Headquarter occupiers surveys. Although disappointing and below target, in general they are nevertheless reasonably good – particularly given the Civic Centre factor. Pleasingly, the best results – including some which actually show an improvement on each two yearly cycle – are those relating to Professionalism and Staff Attitude, and our staff should be commended. Detailed results for the past 4 years, and from each of the four surveys for 2009/10 are included in Appendices 2 and 3. Specific actions we will take are identified in the sections below, on each customer segment.



2. Customer survey 09/10

Customer questionnaires have been issued to the full range of PM&D's external customers for a number of years. In the past the issue of these questionnaires was sporadic, and the returns have often been low, raising the issue of their statistical significance. Since April 2007 we have tried to issue questionnaires on a more routine basis, and it has also become standard practice to include details of where customers can give feedback on the performance of the service in all correspondence issued (both paper and electronically). Disappointingly returns remain poor – only 12 replies this year. The reason for this is unknown, however, it is noted that there is an increasing number of surveys and questionnaires issued, not just by the Council, and our continued low response may in part be a result of survey fatigue. We have tried to compensate by amalgamating the results, as noted above.

As can be seen in Appendix B, which compares results from the four surveys, results from the generic customer survey are consistently high, both in "Good/Excellent" and weighted analyses, but we do not believe them to be statistically significant and there is little we can learn from them.

Our survey also asks if we offer fair and equal access to our services, and the response was 100% affirmative.

As in previous years there were a number of compliments were received that commended staff, and in particular the Property Assistants, for their helpfulness, courtesy and providing an excellent service.

Despite falling returns we will continue to issue our Customer Survey, and will amalgamate results to provide a more sensitive analysis.

3. Professional Services Questionnaire 09/10

The level of return from our first survey of internal (WLC) customers of our professional services was more encouraging – 34 from about 75 issued. When asked about the quality of advice or information received 100% scored us as "Good/Excellent" – a 77% satisfaction level when weighted.

Satisfaction levels relating to the 5 drivers were again high, and only in two questions under each of Timeliness and Information did we actually fall slightly short of the overall targets we had set.

Again comments were generally favourable and complimentary. Any adverse comments related to Timeliness. Some comments appeared to refer to other areas of Property Services, and we will pass those on to colleagues.

You said:	We need to improve how we can be contacted and the speed of response
We did:	We have reinforced the need for better response with our people and will investigate other means of improving communication throughout the year, particularly as we become more familiar with the new systems in Civic Centre. We will also explore how we can clarify the instructions we receive from other services to ensure a quicker and more accurate service

4. Civic Centre Occupiers

As anticipated this survey presented the biggest challenge during 2009/10. It was issued to c800 staff of the seven partners who occupy the Civic Centre and we received 301 replies.

It was important to establish occupier's views about the suitability of the property for staff, service users and visitors. We also wanted to know if occupiers felt there was a clear point of contact for queries, and how to report a repair. In each case the percentage who agreed with the statement was in between 70 and 80%. There is, however, a clear lack of understanding that a Building User Group exists. The table below shows the detailed results, compared against those for the Headquarter Buildings survey for 2007/08 and 2009/10.

	HEADQUARTER BUILDINGS 2007/08	HEADQUARTER BUILDINGS 2009/10	CIVIC CENTRE 2009/10
	% Agree/Strongly agree	% Agree/Strongly agree	% Agree/Strongly agree
The buildings/offices are easily accessible for staff, service users and visitors	82.0%	81.3%	73.1%
The buildings/offices are appropriate for my needs	80.3%	86.1%	77.2%
The buildings/offices are appropriate for service users/visitors needs	78.7%	72.9%	74.2%
The buildings/offices are appropriately secured to protect people and property	88.5%	84.3%	80.3%
There is a clear point of contact for any building or accommodation related queries	90.2%	84.3%	77.2%
	% yes	% yes	% yes
If a building repair is required would you know who to contact	82.5	68.7	71.3
Is there a building user group	32.2	9.1	23.7

As can be seen in Appendix B the results relating to our customer Service Standards were consistently below our challenging targets, and we will need to pay particular attention to Timeliness and Information. Nevertheless it is again pleasing to note that the weighted results for Professionalism and Staff Attitude were around or above the level which equates to a "Good" reply from every respondent. Several comments were particularly complimentary about the Caretaking staff.

Notwithstanding the level of satisfaction, we received almost 500 individual comments and suggestions on the building and our service delivery. These have been categorised as follows:

- Open Plan working
- Car parking

- Common areas, meeting rooms and facilities (Toilets/showers/kitchens)
- Temperature control
- Point of contact/Communication
- Desks, equipment and multi-functional devices
- Reception

It is not feasible to provide a response on every comment, but these categories will form the basis for the “You said, we did” analysis and action plan. As the survey only closed towards the end of March this is still being formulated and will be reported back to all occupiers in the early part of 2010/11.

5. Headquarter buildings occupiers

The level of response to the Headquarter building occupier survey was also satisfying – a total of 166 replies (from an estimated 500 – 600 occupiers) was an actual increase in numbers from the 124 responding to the 2007/08 survey, although with the loss of West Lothian, Lammermuir and Lindsay Houses, and the addition of Lomond House the sample size had reduced.

As can be seen in the table above the general level of satisfaction with the building’s suitability was again high and relatively consistent with previous results. We know, however, that the recent changes in Lomond House in particular will mean that occupiers are less likely to be familiar with points of contact than would be the case in other buildings. The same applies to the operation of Building User Groups. Results for the 5 Drivers were again disappointingly low. Without an onsite presence at most of the five buildings it is perhaps not surprising that the levels for Timeliness are lower than Civic Centre, so we will have to pay particular attention to our speed of delivery.

We received over 200 individual comments and suggestions on the buildings and our service delivery, which have been broadly categorised as follows:

- Car parking
- Common areas and Meeting rooms
- Temperature control
- Point of contact/Communication
- Security
- Accessibility
- Storage and
- Maintenance

As with the Civic Centre survey the action plan is still being formulated because of the late completion of the survey, but it will be fed back to our customers early in 2010/11. However, it should be noted that the council’s programme of office rationalisation may well limit our ability to answer occupiers concerns where any action involved might require investment.

6. Equality questionnaire

The equality questionnaire was developed during 2006/2007 to ensure that PM&D does not discriminate in the delivery of its services. Initially the questionnaire was issued with application forms for the lease of our commercial property (shops, offices and industrial units) but we subsequently expanded the distribution by attaching the questionnaire to our customer surveys.

The questionnaire asks for comments and suggestions as to how we can improve our service. None of the comments received suggests that we need to make improvements.

7. Consultation on Service Standards

Having reviewed our Service Standards during 2009 we consulted with our stakeholders in January 2010. Two questions asked whether the revised Standards were (1) relevant, and (2) clear and easy to understand. We received 33 replies, and in each case the “Good/Excellent” rating was 91%. (Weighted results were 75% and 81% respectively. Accordingly we have taken the view that the revised Standards are appropriate and have published them. The only comments received were complimentary, but related mostly to our service delivery rather than the Standards themselves.

8. Building user groups

As the Facilities Managers of the council's headquarter office buildings we have regular contact with council staff who occupy these properties. The Building User Groups provide a forum for feedback and comment from our colleagues, and for us to raise specific issues of concern (e.g. energy management). The new Building User Group for Civic Centre includes all partners, and not just West Lothian Council employees. In most of the other buildings the management/occupier interface works best where a single officer is nominated as the focus for any occupier comment/concern – however, as a consequence of the Headquarter building survey we will review whether and how BUG's should operate in these properties.

9. Complaint and compliments analysis

During the past few years we have developed, and hopefully improved our processes for handling and recording comments, suggestions and complaints received about our service, as well as requests under the Freedom of Information Act. However, our systems have, to some extent, been superseded by the new Corporate CRM system. Records of customer feedback (outside of formal surveys), may now be kept in two different places.

In 2009/10 we recorded 22 compliments about our people – principally staff attitude and helpfulness.

We provided a direct response to 14 FOI requests and contributed to 7 more – all within prescribed timetables.

We received 11 comments that we have categorised as complaints. Of these

- 5 were about the operation of the Civic Centre – lights left on (mainly by contractors) and visitor parking.
- Four were about procedures for the management and letting of the commercial portfolio. However one was from a member of public alleging (incorrectly) that we had treated a particular tenant preferentially in respect of rent arrears, and another related to an historic difference in recorded documentation prepared by a predecessor authority in 1996. Two were about procedures for the submission of offers, and we have reviewed and tightened our processes as a result.
- One related to the attitude of a Security Guard employed by us on an agency basis. This was referred to his employers.
- One complained about a breach of confidentiality, which arose through the unusual circumstances of two independent businesses jointly occupying a single small office.

We have responded to all complaints, explaining our actions, and indicating that we will review and, where appropriate, change our procedures.

April 2010

APPENDIX A

Current question set	2007		2008		2009		2010			
	% Good/ Excellent	Weighted	% Good/ Excellent	Weighted	% Good/ Excellent	Weighted	TARGET	RESULT	TARGET	RESULT
Delivery										
Please rate the service you received compared to what you needed					82.22%	68.90%	85%	67%	70%	59.81%
Please rate how well the service handled any problems that arose from your request					76.09%	68.12%	80%	68%	70%	59.60%
Please rate how easy it was to contact us	82.96%	71.86%	75.00%	68.58%	83.67%	72.12%	85%	71%	75%	63.88%
Timeliness										
How would you rate the promptness of the service's response to your request?					81.08%	66.68%	85%	65%	70%	56.57%
How would you rate the service's ability to resolve your issue at the first point of contact?					60.61%	58.59%	65%	64%	60%	55.21%
How would you rate our speed in returning telephone calls and replying to letters and emails?	78.05%	66.95%	62.59%	64.27%	69.70%	64.65%	70%	64%	65%	55.20%
How would you rate our punctuality when attending meetings?	87.93%	75.59%	75.91%	68.62%	85.19%	76.55%	90%	82%	80%	66.05%
How would you rate our promptness in processing documentation?					81.82%	67.69%	85%	71%	70%	59.22%

	2007		2008		2009		TARGET	RESULT	TARGET	RESULT
	% Good/ Excellent	Weighted	% Good/ Excellent	Weighted	% Good/ Excellent	Weighted		% Good/ Excellent		Weighted
Information										
In general, how would you rate the service's performance in keeping you informed of the progress of your request?	71.88%	62.51%	63.31%	64.99%	72.09%	61.25%	75%	54%	65%	48.63%
Please rate how accurate and comprehensive the information about the service was					74.42%	65.90%	75%	59%	70%	52.31%
How would you rate PM&D's ability to give information on other relevant council services?	66.94%	61.16%	68.84%	64.02%	73.53%	65.69%	75%	67%	70%	57.07%
How would you rate our explanation of any terms and obligations contained in our documentation?					63.41%	60.98%	65%	71%	65%	59.32%
How would you rate the clarity of our published and promotional material?					67.44%	61.25%	70%	66%	65%	57.80%
Professionalism										
How would you rate the staff's knowledge and skills in dealing with your request?					86.96%	76.10%	90%	79%	80%	68.79%
Staff attitude										
How would you rate the staff's attitude towards you?					89.80%	80.96%	90%	87%	85%	76.55%
How courteous were our staff?	89.39%	78.55%	86.43%	73.35%	90.00%	84.01%	90%	88%	85%	77.16%
How helpful were our staff?	87.12%	76.27%	81.43%	72.63%	87.76%	81.64%	90%	85%	85%	74.43%

	2007		2008		2009		TARGET	RESULT	TARGET	RESULT
	% Good/ Excellent	Weighted	% Good/ Excellent	Weighted	% Good/ Excellent	Weighted		% Good/ Excellent		Weighted
Overall Level of Service										
How would you rate PM&D's overall level of service?	81.95%	69.94%	76.26%	67.40%	85.42%	75.70%	90%	73%	80%	62.47%
Do you consider that PM&D offers fair and equal access to the services it provides? (NB Yes/no answer)	93.33%	93.33%	100.00%	100.00%	100.00%	100.00%	100%	100%	100%	100.00%

APPENDIX B

Consolidated Analysis 2010										
Current question set	Customer Survey 2010		Professional services survey 2010		Civic Centre survey 2010		Admin building survey 2010		Consolidated results	
	% G/E	Weighted	% G/E	Weighted	% G/E	Weighted	% G/E	Weighted	% Good/Excellent	Weighted
Delivery										
Please rate the service you received compared to what you needed	91.7%	85.9%	93.9%	70.2%	66.2%	58.0%	52.9%	53.5%	67.2%	59.8%
Please rate how well the service handled any problems that arose from your request	91.7%	85.9%	97.0%	72.2%	64.7%	56.7%	57.1%	54.6%	67.8%	59.6%
Please rate how easy it was to contact us	91.7%	85.9%	90.6%	76.8%	68.4%	61.8%	63.9%	57.5%	70.8%	63.9%
Timeliness										
How would you rate the promptness of the service's response to your request?	100.0%	85.8%	88.2%	65.1%	61.9%	55.0%	53.3%	48.5%	64.8%	56.6%
How would you rate the service's ability to resolve your issue at the first point of contact?	100.0%	85.8%	90.9%	68.2%	56.0%	51.3%	64.4%	51.5%	63.8%	55.2%
How would you rate our speed in returning telephone calls and replying to letters and emails?	100.0%	91.5%	85.7%	65.2%	55.3%	50.3%	64.0%	52.2%	63.6%	55.2%
How would you rate our punctuality when attending meetings?	100.0%	88.7%	93.5%	74.8%	80.0%	64.0%	70.0%	54.5%	81.6%	66.0%
How would you rate our promptness in processing documentation?	100.0%	88.7%	75.9%	62.7%	65.1%	55.8%	70.3%	52.6%	70.8%	59.2%

Current question set	Customer Survey 2010		Professional services survey 2010		Civic Centre survey 2010		Admin building survey 2010		Consolidated results	
	% G/E	Weighted	% G/E	Weighted	% G/E	Weighted	% G/E	Weighted	% Good/Excellent	Weighted
Information										
In general, how would you rate the service's performance in keeping you informed of the progress of your request?	100.0%	88.7%	79.4%	62.2%	45.5%	43.0%	52.7%	45.7%	54.1%	48.6%
Please rate how accurate and comprehensive the information about the service was	100.0%	85.8%	87.9%	68.2%	48.9%	45.4%	58.3%	51.0%	59.1%	52.3%
How would you rate PM&D's ability to give information on other relevant council services?	91.7%	77.5%	96.2%	71.3%	59.0%	52.6%	61.5%	50.8%	67.2%	57.1%
How would you rate our explanation of any terms and obligations contained in our documentation?	91.7%	80.3%	96.0%	71.5%	63.9%	54.6%	61.8%	52.5%	70.8%	59.3%
How would you rate the clarity of our published and promotional material?	91.7%	80.3%	87.5%	67.5%	57.7%	53.6%	67.6%	54.5%	65.8%	57.8%
Professionalism										
How would you rate the staff's knowledge and skills in dealing with your request?	100.0%	88.7%	100.0%	85.1%	75.5%	65.1%	73.4%	66.3%	78.7%	68.8%
Staff attitude										
How would you rate the staff's attitude towards you?	100.0%	94.3%	100.0%	92.6%	86.3%	75.2%	82.2%	68.1%	87.4%	76.6%
How courteous were our staff?	100.0%	94.3%	100.0%	94.0%	87.2%	75.8%	83.6%	69.0%	88.1%	77.2%
How helpful were our staff?	100.0%	94.3%	100.0%	88.3%	83.7%	73.1%	80.6%	67.2%	85.2%	74.4%

Current question set	Customer Survey 2010		Professional services survey 2010		Civic Centre survey 2010		Admin building survey 2010			Consolidated results	
	% G/E	Weighted	% G/E	Weighted	% G/E	Weighted	% G/E	Weighted		% Good/Excellent	Weighted
Overall Level of Service											
How would you rate PM&D's overall level of service?	100.0%	94.3%	97.1%	75.0%	70.9%	59.9%	67.1%	58.8%		73.2%	62.5%
Do you consider that PM&D offers fair and equal access to the services it provides? (NB Yes/no answer)	100.0%	100.0%								100.0%	100.0%

Appendix 11 – Activity Budget 2010/2011

Activity	Objective	Corporate Planning Priority	Performance Measure and Target 2010/11	Projected Output Narrative for 2010/11	Projected Output Unit for 2010/11	Staff Resource (FTE)	Output Unit / FTE	Revenue Cost / Output Unit	Revenue Budget 2010/11	Capital Budget 2010/11
								£	£	£
Disposal of Surplus Land and Property	To maximise receipts from disposals at the appropriate time to feed the Council's capital programme	Making Our Economy Stronger	Meet receipt targets: £6.80 million	Number of surplus properties disposed	15	2.5	6	25,827	387,406	0
Management of the Commercial Portfolio	To maximise the income from the property portfolio and to maintain long term performance	Making Our Economy Stronger	Meet targeted income requirements £4.60 million	Number of commercial leases managed	766	6.0	128	(3,113)	(2,384,355)	48,000
Rental Arrears Control	To minimise the current and historical levels of rental arrears	Making Our Economy Stronger	Achievement of required targets: Historic debt 1.5% Current debt 4.0%	Rent arrears control: hours	1,034	0.8	1,379	(288)	(298,044)	0
Rating Appeals and Management of Non-domestic rates	To minimise the amount of rates which the Council pays on operational property and the commercial portfolio	Making Services As Efficient As Possible	Number of ratings appeals where reductions were achieved	Rating appeal reductions	50	0.3	200	91	4,558	0

Valuation of Land and Property	To give high quality professional valuation advice to Members and Officers on demand	Making Services As Efficient As Possible	Completion of revaluation within specified time scale: valuation on 20% of assets in the Council's Asset Register	Valuation of land and property: hours	1,292	1.0	1,292	35	45,578	0
Wayleaves and Servitudes	To grant wayleaves and servitudes in order to maximise income and minimise impact on the land and to record the locations on the Terrier system.	Making Services As Efficient As Possible	Satisfactory completion of all Wayleaves and Servitudes within customers timescales	Wayleaves and Servitudes granted	15	0.3	50	3,039	45,578	0
Property Records Management and Enquiries	To keep full and current records of all land and property owned by the Council to allow for the proper management of assets and to answer property enquiries as required	Making Services As Efficient As Possible	To record all changes in ownership of Council land and property: 100%	Maintenance of property records and management of property enquiries: hours	1,292	1.0	1,292	71	91,154	100,000

Professional Property Advice	To ensure on demand availability of expert professional advice to Members and Officers.	Making Our Economy Stronger	Number of queries	Expert property advice made available: number of queries	150	1.5	100	304	45,578	0
Land Supply / Infrastructure and supply of business space	To secure improvements in business property and infrastructure, and a range of choice of sites available for development, by quality, location and size.	Making Our Economy Stronger	Improved supply of development (projects)	Average ha per annum	12	1.5	8	7,596	91,154	0
Business Support	To provide information, advice and assistance to local businesses and inward investors on the procurement of suitable premises.	Making Our Economy Stronger	Support for businesses	Number of business enquiries	20	0.1	200	2,279	45,578	0

The management of the Council's HQ buildings	To manage the six main HQ buildings to provide safe, clean and well maintained buildings and to deliver the service within the predetermined budget	Making Services As Efficient As Possible	To deliver services within budget and within agreed timescales	HQ buildings managed	7	7.6	1	361,436	2,530,053	163,000
	Total :-					22.5			604,235	311,000

APPENDIX 12 - Initiatives 2010/2011

Source	Improvement Initiative	Desired Outcome	Measure of Success	Start date dd/mm/yy	Finish date dd/mm/yy	Revenue budget
Service Efficiencies	We will review our internal processes to secure efficiencies that will enable us to reduce our office based staff complement from 16 to 14FTE; our FMA's by 1 FTE; and our use of Agency staff	Streamlined processes and more efficient work practices	Existing workload delivered by reduced staff numbers. c10% saving in team budget.	01/02/10	31/03/11	Total saving £121,000
Service Efficiencies	We will secure increased income from the council's commercial portfolio, through rent reviews and enhanced rentals on new lease	Increased revenue income to the council	Increased revenue income in accordance with revised budget	01/02/10	31/03/12	Increased income £166,000
Service Efficiencies	We will secure revenue savings from the energy budget for the Headquarter buildings	Reduced revenue expenditure for the council	Revenue saving in accordance with revised budget	01/02/10	31/03/11	Total saving £46,000

Full details of these Initiatives (including current and projected performance, responsible officer and target dates) can be found on the council's Initiatives database