Tri-Service collaboration update

Executive Committee

Date: 25 February 2021

Agenda Item:

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Submitted By: Director of Service Support

Purpose	To update the Executive Committee on the progress of current work.
Recommendations	The Executive Committee note of contents of this report.
Summary	The Tri-Service Collaboration Executive Board has identified six workstreams which have been initiated as projects.
	Each project will be delivered in phases; Phase One Reports are now being compiled and will be submitted to the Tri-Service Collaboration Executive Board on the 22nd April 2021.
	This report provides a short update to the Executive Committee on Phase One of the programme.

Local Government (Access to information) Act 1972

Exemption Category: None

Contact Officer: Sam Moxon, WYFRS Collaboration project lead officer
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Background papers open to inspection: None

Annexes: None

1   Introduction

1.1   On the 3 July 2020, the Tri-Service Collaboration Executive Board (TSCEB) initiated six workstreams for phase one scoping work.

The six workstreams which form the programme are:

- Occupational Health

- Health and Safety Teams

- Shared Estates

- Multi-Discipline Staff

- Shared Training and Training Facilities

- Fleet management and Workshops

1.2   Each organisation is leading on two projects; with West Yorkshire Fire and Rescue Service (WYFRS) leading on:

- Fleet Management & Workshops – Glynn Richardson

- Health & Safety – Mark Dixon

1.3   The programme will be delivered in phases; Phase one reports will be submitted to the TSCEB on the 22nd April 2021.

2   Programme Delivery

2.1   Phase One is a high-level comparison across the three services which will consider areas including:

- Fixed costs

- Overview of Roles, Responsibilities and Objectives (departmental and individual)

- IT systems employed

- Employee functions

- Systems and work currently in place and ongoing

- Dependencies

- Risks

2.2   This initial comparison has been carried out by each of the workstream groups to try and identify any potential areas for collaboration, including the benefits and risks expected with collaboration in those areas.

2.3   The detailed information which forms the basis of comparisons across the three organisations will be presented to the TSCEB to agree the areas for further scoping and

progression within Phase two. It is intended that Phase one will present an overview of where opportunities may be found.

2.4   Phase two will look to explore these specific areas in greater detail in the aim of developing options which can be progressed for collaboration. No decision or commitment will be required by the Authority, with regard to any proposed collaboration opportunities, until the end of Phase two.

3   Phase One Progress

3.1   By bringing together the leads of each department to carry out Phase one, opportunities for collaboration have been identified and discussed. At this stage the opportunities identified are simple, quick and low risk to the organisations, however, the more complex or large-scale opportunities need further work to identify, evaluate and develop as part of phase two and three.

3.2   An update on each of the workstreams progress is summarised below.

3.2.1 Shared Estates

The leads for Estates departments have held a number of meetings, most recently carrying out a number of cross-mapping exercises to try identify potential locations for collaborations. Further work to incorporate the work carried out by other workstreams may also bear opportunities, such as joint working and estates within Workshops, Training, Multi-Discipline Staff, OHSU and Health and Safety Teams.

3.2.2 Fleet & Workshops

The team working on the Fleet and Workshops workstream have had high demand upon their services throughout the COVID-19 pandemic but have managed to carry out a thorough review of each services requirements, expenditure and dependencies.

At this time a number of possible collaborations have been identified, these are:

- Vehicle Telematics Contracts
- Service contracts for specialist equipment used in the workshops
- Vehicle purchase
- Sharing 'peak demand' for some tasks between the three facilities to overcome unexpected short-term issues with capacity
- Collaboration on workshop standards and accreditation

3.2.3 Training & Training Venues

The requirements of the three training departments has changed a number of times through phase one as they have needed to implement different ways of working. Remote learning and assessment has meant that each organisation has been learning

and adapting to a changing environment with innovative ways to provide content, communication and assurance.

Most of the training content provided by WYFRS, YAS and WYP is safety critical and must meet time bound revalidation periods. The majority of operational courses such as BA training, Medical treatment etc. still require a physical attendance from the participants. Therefore, the need for social distancing and other COVID-19 measures has meant fewer students per course and increased pressure on the space needed for training to be carried out. Consequently, one of the main benefits of the regular tri-service meetings has been the agreements to share space in classrooms and training environments.

Work has also been carried out to cross-map the training courses provided and required by each organisation to identify opportunities to share capacity or reduce costs. Workforce development such as leadership and management training is likely to provide more opportunity for collaboration than operational training.

3.2.4 Multi-discipline Staff

The remit of this workstream differed from the other workstreams by the fact that this would mean the creation of a new entity to assist the aims of all three organisations. The scope for this and the areas which would benefit from the new role have been explored in phase one.

A few examples of multi-discipline staff exist within other areas of the country, the intention was to visit some of the areas but COVID-19 meant that this was not possible to the extent planned. The primary objectives of the multi-discipline staff in these areas is to support the prevention and safety aims of the organisations. Response is not a function of these roles.

Following the initial scoping it is believed that there are a number of other areas where a 'multi-discipline' role would benefit the organisations/communities. These areas include:

- Risk analysis and demand reduction – The ability to work collaboratively and share data to better understand our communities, risks and demand.

- 999 volunteers (already carried out between WYFRS & WYP)
- Safety & Prevention work

3.2.5 Occupational Health Unit

This workstream was categorised as a priority two workstream when the projects were initiated and the completion of a Phase One report was not expected at this time.

This workstream has seen limited progress due to the COVID-19 pandemic. The project is led by Yorkshire Ambulance Service (YAS) who have experienced increased workloads within their organisation.

3.2.6 **Health & Safety**

The Health and Safety (H&S) workstream is led by WYFRS. The workstream has seen good progress by WYFRS and West Yorkshire Police (WYP) but the involvement of YAS has been limited as is the case with the Occupational Health workstream.

The leads from WYP and WYFRS feel that there would be value in investigating the H&S roles and responsibilities at incidents where all three services are present as the operational environment can become quite complex. There is an agreement in principle to carry out this work

Opportunities to collaborate on the delivery of common H&S training across all three services are also being considered.

4   COVID-19

4.1   The COVID-19 pandemic continues to affect each of the organisations, particularly the Yorkshire Ambulance Service. Initially the emergency caused the workstreams to be halted but over time, as the organisations have adapted and learnt, implementing new ways of working, the workstreams have been able to progress again, but at a slower pace than planned. As a consequence, a decision was made to extend the delivery of phase one reports by three-months.

4.2   The reports are now being finalised and will be presented to the Tri-Service Collaboration Steering Group on 10 March 2020 prior to the board on 22 April 2020. Each project lead will attend the meeting virtually to provide a verbal update and be able to discuss progress to date.

5   Next Stage - Phase Two

5.1   The projects will work to further scope and progress the potential collaboration opportunities agreed by the TSCEB. This work will look in greater detail to support decision making when determining the final options for collaboration (Phase Three).

5.2   Data considered will include:

- Exploring common areas of risk, current work streams and their effectiveness
- Benchmarking to identify best practice
- Strengths and weaknesses within each service
- Detailed analysis of Roles, Responsibilities and Objectives (departmental and individual)
- Identifying the pros and cons of current systems and work streams
- Demand Need Analysis
- Estate costs – lighting/heating/rental/operating costs
- IT- licence costs/ renewal dates/compatibility

- Employee costs – senior leadership / Consultants / admin / case managers / agency staff

- In-direct benefits and impacts

6   Financial Implications

6.1   At this time there are no direct financial implications attributed to this report. All collaboration options or reviews will be subject to financial impact assessments.

7   Human Resource and Diversity Implications

7.1   At this time there are no direct human resource and diversity implications. All collaboration options or reviews will be subject to equality, diversity, and inclusion impact assessments.

8   Health, Safety and Wellbeing Implications

8.1   At this time there are no direct Health and Safety implications. All collaboration options or reviews will be subject to assessments regarding the health, safety and wellbeing implications.

9   Environmental Implications

9.1   At this time there are no direct environmental impact implications. All collaboration options or reviews will be subject to environmental impact assessments.

10   Your Fire and Rescue Service Priorities

10.1   The Integrated Risk Management Plan is critical to the delivery of our ambition of "Making West Yorkshire Safer". These proposals will help achieve our priorities of:

- Reduce the risks to the communities of West Yorkshire

- Continue to develop ways of working which improve the safety & effectiveness of our firefighters

- Work efficiently to provide value for money and make the best use of reserves to provide an effective service

- Be innovative and work smarter throughout the service

- Invest in information and communication technology, digital and data, to deliver our service in smarter ways

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- Continue working towards delivering a more inclusive workforce, which reflects and serves the needs of the diverse communities of West Yorkshire

- Actively look for opportunities to implement learning from the Grenfell Inquiry to improve how we respond to high rise emergencies and other foreseeable risks

- Promote environmentally friendly ways of working, reduce waste and raise awareness among staff to both fight climate change and respond more effectively to incidents driven by extreme weather events

- Support, develop and enable our people to be at their best

- Use the HMICFRS assessment of 'Good' in all areas as a foundation to implement our improvement action plan with the aim of delivering

11   Conclusions

11.1   The programme will present the first phase reports and findings to the TSCSG on 10 March 2021. The outcomes of these reports will be presented to the TSCEB on 22 April 2021 for consideration.

11.2   It is anticipated that the TSCEB will outline the areas which it wishes to be explored further for collaboration opportunities. A report will then be provided to this Committee to present the latest developments and intentions.

West Yorkshire
Fire & Rescue Authority

Property Review and Team Restructure
Executive Committee

Date: 25 February 2021

Agenda Item:

7

Submitted By: Director of Service Support

Purpose	To update Members on the review of the Authority's Property Management Unit and seek approval to implement changes to revise the Unit's management structure including the appointment of three fixed-term project officers.
Recommendations	That Members 1) note the findings and reccomendations in the fundamental review 2) approve the addition of Technical Officer post with the new structure 3) approve the appointment of three fixed-term project officers for up to three years.
Summary	The Property Management Unit is tasked with the upkeep of the Authority's property assets to ensure that they remain serviceable and fit for purpose. The independent review carried by external consultants recommends a number of changes to the existing structure, processes and systems within the unit to make it more efficient and effective. The Authority has also agreed the unit's capital plan for the next 5 years which will see the redevelopment of the FSHQ site and the rebuild of four other fire stations. In order to support the team to achieve this a further three temporary posts are required on a fixed-term basis.

Local Government (Access to information) Act 1972

Exemption Category: None

Contact Officer: Nick Smith Director of Service Support

Background papers open to inspection: N/A

Annexes: Property Review – executive summary

1   Introduction

1.1   The Property Management Unit (PMU) is tasked with the upkeep of the Authority's estate. The demands on the team are significant and in recent years the ability of the Unit to meet the ongoing, heavy workload with regard to maintaining the estate and new building requirements has prompted the need to fundamentally review its structure, processes and systems.

1.2   Management Board agreed the following terms of reference for the review:

A Review the PMU to assure the required level of service to meet statutory duties, and maintain the Property portfolio to a high standard to reflect the needs of WYRFS, employees and other stakeholders.

B To consider capability skill sets and resource structure within the PMU team and make recommendations where appropriate in support of service improvements

C Make comparisons in terms of best in class against other Fire and Rescue Authorities and local authority property providers, measuring the effectiveness of the property team.

D Explore various models for the provision of the service.

E Explore opportunities for collaboration with other blue light providers.

F Any other item that would bring any added value.

1.3   Following a competitive tendering exercise, an independent consultant was appointed to carry out the review and the final report was presented and approved by Management Board on the 25 Nov 2020 a copy of the executive summary is attached to this report.

1.4   The report concludes that there is opportunity to improve the current structure. It recommends additional resources to enable it to meet its statutory compliance duties and reduce its reliance on external consultants. It has 26 recommendations, some of which are already in progress. Generally, the majority of recommendations focus on the need to change the departmental structures to provide clearer roles and responsibilities for the team.

1.5   The existing structure employs a Senior Technical Services Manager (STSM) to oversee the Unit. This role reports to the Director of Service Support. Under the revised structure this post would be removed from the establishment with the new post of Head of Estate and the existing Transport & Logistics Manager reporting directly to the Director of Service Support.

1.6   The current STSM has been consulted on these new revisions to the existing structure and wishes to retire early from the service on grounds of efficiency. He will retire from the Authority on 31 March 2021.

1.7   Additional resource is also required to reduce the department's reliance on the use of external consultants by employing a Technical Officer with relevant electrical and mechanical experience.

1.8   In summary, the proposed new structure would see an increase in the establishment costs of the department of approximately £20,703 but this would see a corresponding reduction in revenue cost in the use of consultants.

1.9   The total expenditure on consultants within the property department in 2019/20 was £368,000 with approximately £98,551 going to electrical consultants. The introduction of an in-house resource should see significant reduction in future expenditure which would compensate for the additional staffing cost.

1.10   The table below compares the existing structure to that of the new proposed structure.

<u>Cost Comparison Table based on the top of the Grade with full oncosts</u>

Existing	Cost	New	Cost
Senior Tech Services Manager EO4 *	£87,573 *(£3,280)	Head of Estate EO2 New	£70,498
Property Manager E01 *	£64,730 * (£3,331)	Property Manager G12	£60,154
Deputy Manager G10	£52,335	Facilities Manager G10	£52,335
Contracts officer G9	£48,423	Facilities Officer G8	£44,282
		Technical Officer G8 New	£44,282
Works Procurement G6	£37,533	Project Officer G6	£37,533
H/S Officer G7	£41,013	Compliance Officer G7	£41,013
Admin G3	£27,847	Admin G3	£27,847
Admin Asst G2	£25,634	Admin Asst G3	£27,847
Caretaker G4	£30,771	Caretaker G4	£30,771
Deputy Caretaker G2	£25,634	Deputy Caretaker G2	£25,634
Mobile Caretaker G2	£25,634	Mobile Caretaker G2	£25,634
Headcount 11	£467,127 *(£6,593)	Headcount 12	£487,830

*Authority lease car provided

All the above posts have been job evaluated using the Authority's existing job evaluation protocols and the Representative bodies have been consulted on the review and will continue to be so during implementation. Any post which results in any downgrading is fully protected for a 12-month period.

1.11   In order to implement the review and its recommendations and provide a smooth handover, we will, if possible, appoint the Head of Estate prior to the departure of the existing Senior Technical Services Manager.

1.12   The Transport and Logistics Manager post has also been regraded from EO1 to EO2 recognising the need to take on some of the duties performed by the existing STSM relating to Transport and Logistic activities. This will see an increase of £5,768 including oncosts.

1.13   The Authority has also approved the Unit's five-year capital plan which will see the redevelopment of the HQ and Training Centre site and the relocation of Cleckheaton Fire Station, together with three other fire station rebuilds. This is the most ambitious capital programme in the history of West Yorkshire Fire & Rescue Authority. In order to ensure we have the right governance in place it is also recommended and approval is being sought to appoint a Programme Team consisting of three staff members on fixed-term contracts for up to three years, as detailed in the table below.

1.14   These posts will ensure that all stakeholder engagements are undertaken correctly and in a timely manner and that all the programme objectives are achieved. This team will also oversee the transition of departments and team movements prior and post construction of the new FSHQ site.

<u>Programme Management Team Fixed Term Contract</u>
(Based on top of the grade with full oncosts)

Temporary Fixed Term Post	Grade	Cost
Future Development Programme Manager	G12	£60,154
Future Developments Project Manager	G10	£52,335
Future Development Business Analysis	G7	£41,013
Total		£153,502

2   Financial Implications

2.1   The additional costs associated with the property review as detailed in 1.9 can be summarised in the table below

Existing Structure	-£473,720
Revised Structure	£487,830
Regrade of Fleet Manager	£5,768
Budget Growth	£19,878

This requires budget growth of £19,878 which has been included within the 2021/22 revenue budget.

2.2   The costs associated with the project team that will oversee the development of the FSHQ site has been included as a growth bid in the 2021/22 revenue budget, this does not include any provision for redundancy costs detailed in section 3 below. These will have to be met from within existing budgets.

3   Human Resource and Diversity Implications

3.1   The revised restructure would add additional resource to the team and thus assist with the ongoing updates on our buildings to cater for Diversity updates to our estate profile.

3.2   The new structure has been subject to extensive consultation with both the affected employees and the relevant trade unions. Staff have had the opportunity to comment on and contribute to the changes within the team.

3.3   The process for slotting in/ringfencing staff into the new roles will be in line with the Authority's Redeployment Policy. Once the new structure is approved, staff will have one to one meetings with HR and their line manager to discuss the role(s) available to them. Any employee who accepts a post in the new structure which is on a lower salary/grade to their current role will receive salary pay protection for a 12 month period.

3.4   Posts in the new structure which are not ringfenced to current team members will be available through open competition in line with the Authority's Recuitment and Selection Policy.

3.5   As the fixed term contract posts are for a period of up to 3 years, employees in post will be subject to a small redundancy payment on termination if they are in post beyond two years. This is in line with the Authority's Early Termination Policy and employment legislation.

4.   Health, Safety and Wellbeing Implications

4.1   The new structure, along with new roles and responsibilities should improve the ability of the team to undertake its Health and Safety compliance duties. The proposal to increase the team size and provide temporary support from project officers will improve the capacity within the team and reduce the risk of work-related stress.

5   Environmental Implications

5.1   Environmental requirements are increasing across the estate and placing additional demands on the team. The proposed increase in resource will aid with the introduction of environmental initiatives across the estate.

6.   Your Fire and Rescue Service Priorities

6.1   The review of the Property Unit and the revision of its structure is a major investment in our priority to maintain our fire stations and departments/buildings which are fit for purpose.
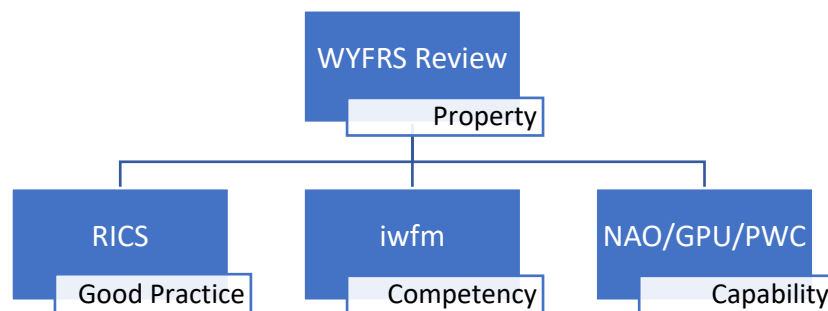
7.   Conclusion

7.1   The independent, fundamental review of the Property Management Unit has highlighted that there is opportunity to improve the efficiency and effectiveness of the Unit's management structure. It also recommends a number of improvements to processes and systems that will allow the team to function better with new ways of working, improved statutory compliance, and less reliance on external consultants to fulfil existing shortfalls.

7.2   In order to implement the changes, the new Head of Estate will be appointed as soon as possible; together with the appointment of a Programme Team consisting of three fixed-term project officers, for up to three years, to support the ambitious capital plan.

Executive Summary

The Property Management Unit (PMU) is working with little, if any, reference to good practice benchmarks; and the service being provided is unstructured and without clear horizon and direction of travel.

There are many publications and research reports of good practice spanning many years, but the following recent guidance is of particular relevance to the public sector and used during this review:

Royal Institution of Chartered Surveyors (RICS) – Public Sector Property Asset Management
Institute of Workplace & Facilities Management (iwfm) – Professional Standards Handbook
National Audit Office; Government Property Unit; PriceWaterhouseCooper – Property Asset Management Capability Assessment Model (PAMCAM)

Property Asset Management and Property Management are distinctly different functions, but which must interrelate effectively in order to provide an efficient Estates service to the organisation.

Property Asset Management is a strategic and tactical role concerned with engaging end users and stakeholders in the development and progression of Property Strategies, Policies and Plans; and for ensuring the property asset base is optimally structured to align with Corporate Objectives. This role requires good business skills with knowledge of property and the organisation (but not necessarily a property professional) to ensure continuous

assessments on Condition, Suitability, Sufficiency and Cost associated with Property Assets. In the case of WYFRS, the role of Property Asset Management would be fulfilled by the Senior Technical Services Manager (STSM).

Property and Facilities Management is the operational activity of managing projects, managing planned servicing, overseeing repairs and maintenance, commissioning and managing contracts; liaising with client departments and ensuring compliance with health & safety requirements and mandatory inspections etc. It is anticipated these roles would be filled by experienced property professionals and allocated between the WYFRS Property Manager (PM) and Deputy Property Manager (DPM).

This review made use of the National Audit Office (NAO) Property Asset Management Capability Assessment Model (PAMCAM) to consider strengths and areas for improvement against 38 criteria. There were no identifiable instances of "Best Practice" within WYFRS; there were 26% of responses indicating "Good Practice" and 74% of responses indicating "Areas for Improvement".

The self-assessment and consensus exercises were undertaken by the STSM, PM and DPM; facilitated by this report author and with input from the Director of Service Support.

The PAMCAM self-assessment exercise revealed a clear need to improve management systems, procedures and standards. Examples include (but not limited to) a lack of:

- Effective Property Asset Management
- Performance Management Framework
- Structured Procedures and Specifications
- Effective Contract Management
- Change Control (around internally managed projects)
- Consolidated Property Asset Data / Management Information
- Training & Development Plans

There is insufficient evidence of effective Property Asset Management Planning / Strategy hence not being translated into management processes covering policy and asset management practice.

Ensuring asset management processes are properly and consistently undertaken throughout the authority would positively impact on service delivery, asset and organisational performance and outcomes; including improved compliance and increased service user and stakeholders' satisfaction.

The operational needs of the fire service are a primary driver to the provision of property services but the lack of an effective Property Asset Management Plan and Performance Management Framework have the potential to hinder having a property portfolio that is

efficiently managed and fit for purpose to support the aims of service delivery and efficiency.

In requesting a copy of the current WYFRS Property Asset Management Plan, a copy entitled "Strategic Asset Management Plan for Property" was eventually located, but on inspection this was written in 2005. The Property Asset Management Plan should be the key driver for providing property management services to the authority and its' operational fire service. The Property portfolio is therefore not being managed in accordance with good practice standards.

All public sector authorities are mandated to work together to create a delivery system that maximises the collaborative use of property assets. The authority is developing working relationships with other emergency services (principally the Police) but at this early stage there is little evidence of sharing performance management information, joint working & strategies; although there a few examples of co-location at fire stations.

Although the job descriptions & person specifications of the property team were updated late 2019 / early 2020, this appears to have been mainly an exercise to assimilate pay grades, and less so about the organisation and effectiveness of the team.

Upon examination of the job descriptions (and confirmed by staff survey) there is a lack of clarity and segregation of responsibilities between functions (e.g. between Senior Technical Services Manager and Property Manager); there are obsolete responsibilities (e.g. relating to new procurement arrangements); inappropriate responsibilities (e.g. works project officer being expected to provide senior admin support); unclear accountability between job share compliance officers; functions allocated to one role but in reality being performed by others (e.g. clerk of work function), and in particular the building contracts manager job description appeared to be multi-functional and lacking focused job purpose.

To ensure clear job purpose, objectives and accountabilities the team would be better organised and resourced to deliver a more effective Estates Management service thus:

Customers								
Property Asset Management (Intelligent Client)		Lead	Reactive	Helpdesk		Consultants & Contractors	Systems & Processes	Compliance
		Lead	Planned	Caretakers				
		Lead	Minor Projects					
		Lead	Major Projects					

In the suggested model:

- Customers are of prime importance
- Property Asset Management represents Customers in a strategic "Intelligent Client[1]" role.
- There are four operational themes to property services (reactive repairs, planned maintenance, minor projects and major projects).
- Fault reports need to be logged, managed and resolved via a proper helpdesk function (possibly outsourced under a Police tender);
- Caretakers assist with an extended range of planned maintenance routines and undertake a number of reactive repairs (covering all locations, not just HQ's and SDC)
- Consultants and contractors support all aspects of service provision, including systems support.
- There are numerous systems in use for managing information and processes.
- Compliance sits across all four operational themes, including external providers.
- Each service theme needs to be managed by an assigned "lead officer".

The results of a staff survey suggested a lack of strong leadership and direction, poor management, inadequate communication, ill-defined job responsibilities, lack of work structure, ineffective team working and a general sense of chaos; due in part to being under-resourced and under constant pressure.

The survey encouraged suggestions for improvement and which included: improved management techniques, more training, clearer allocation of responsibilities; and a need to reduce excessive spans of responsibility and workload. Suggestions also included establishing a resourced helpdesk; ensuring integrated strategies, policies and procedures; and creating a library of standards and specifications to ensure consistent quality; as well as introducing a customer satisfaction survey.

The survey produced a wealth of suggestions for improvements that were an outpouring from a frustrated group of people that were not working as a "team" and that felt they were not being listened to.

This report makes recommendations to reshape the property team and to realign job descriptions. The report also suggests changes to management reporting lines immediately below Director level.

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[1] RICS: It is the ability of the organisation to clearly and succinctly articulate its requirements in terms of the provision of services. It is a useful concept in relation to property asset management as an organisation's property and accommodation requirements are often driven by many operational and other objectives which may be uncoordinated and inefficient as a whole. The intelligent client pulls these requirements together to make them coherent, practical, efficient and effective.

Staff costs (including on-costs) of the existing 7-tiered team structure is £467k p.a. and the potential cost (including on-costs) of a 5-tiered restructured team would be circa £487k (and increase of £20k).

The review of PMU looked for benchmarking comparators but quickly established this is an area that is generally undeveloped across blue light services. The fact that benchmarking arrangement do not exist makes it difficult to identify best practice in other authorities from which to learn and measure improvements.

Furthermore, there is no obvious national leadership and co-ordination for establishing a standardised benchmarking system, comprising comprehensive and relevant property performance measurements and comparisons. As a result of not having such performance measures in place, emergency services cannot effectively review the performance of their respective property portfolios, property asset management practices, workspace and accommodation.

It is therefore extremely difficult to establish to what degree property resources are being managed in an efficient and effective manner. As an alternative to benchmarking with other authorities, this review drew comparisons with industry best practice models.

The authority's property portfolio is not large enough to justify permanently employing a wide range of professional specialists, but there are some skills that could potentially be employed on a shared service basis and these should be explored further with other public sector authorities. Energy management being one example.

With regards Capital Works (new build), the standard practice adopted by the property team is to appoint consultants and contractors on a project by project basis using a traditional procurement process (in that an architect produces the design which is then submitted to contractors to tender). Best practice suggests appointing consultants and contractors on a programme of works basis (rather than single projects) using a 2 Stage Open Book process under an NEC Form of Contract; that requires the contractor to provide input at the design stage before submitting an open book tendered price. The authority reserves the option to not accept the contractors' price and to revert to competitive tendering.

A 2 Stage Open Book process is in line with Government best practice. It is efficient in terms of needing less procurement and contract management resources; it provides for relationship building with consultants and contractors and provides best value assurance to the authority through open book accounting. Break clauses for convenience are built into

the contracts to ensure the authority retains the option of early termination. This model requires strong in-house contract management.

The Facilities Management Operating Model being applied by the authority is a Hybrid Model comprising a large number of Single Supplier contracts, two Bundled contracts and three Managing Agent contracts, and the admin resource required to co-ordinate jobs and to manage these contracts is moderately high.

The authority needs to work smarter by moving more towards "bundling" contracts together, such that one contractor provides multiple services and hence lessen the use of single supplier contracts; and also shifting responsibility onto contractors to produce servicing schedules & schedules of work and to efficiently organise themselves to deliver against those schedules. The property team would approve the schedules and monitor performance rather than produce the schedules and organise / reorganise visits. Any shift in responsibility to contractors could be managed through a contract variation process rather than waiting until contract renewal.

With regards to asset condition surveys; the next 5-year assessment is now due, but unlike previous reports, the authority should extend the consultants' specification to include Health & Safety, Fire Regulations, Accessibility and any other appropriate compliance checks. Previous assessments have focused on the condition of the buildings and assets and did not include compliance.

The authority is failing to apply life cycle costings to new build options analysis, thereby capital investment decisions are being made on capitalised costs only without taking into account whole life revenue costs associated with operating the assets. This runs the risk of taking short term (capital) decisions at the expense of long term (revenue) costs. The long-term affordability question is not being effectively considered.

In terms of potential shared services between blue light authorities there appears to be little appetite or obvious benefits to sharing in-house support service resources other than a few examples where police cohabit fire station locations that are co-ordinated via the Tri-service working group. Beyond these few examples current collaborative activity appears to be limited knowledge sharing and limited joint tendering opportunities. There are no effective overarching Estates Strategy or Joined-Up Work Programme. The impending devolution of West Yorkshire authorities under an elected Mayor may prove to be the catalyst for change that goes beyond WYFRS and WYP.

In summary, the range of issues identified from this review are fundamental, extensive, deep rooted and long-standing. The management team have been too operationally focused and failed over a number of years to take a helicopter view of the service to fully

appreciate the issues; resulting in a lack of initiative to make improvements; and causing service performance and standards to degrade.

For these reasons it is considered unlikely the current management team can effectively plan, implement and embed the necessary best practice improvements without external assistance.

4. Recommendations

R1: The authority should ensure a rolling 10-year Property Asset Management Plan is produced (and refreshed at least in line with the 3-year IRMP timeframe) in accordance with RICS Guidance (see extract at Appendix A). {West Lothian Council (2018-28) have published a good working example}. The Property Asset Management Plan should be formally approved and published for public information.

R2: The authority should produce and publish a set of Policy documents relating to Property and ensure they remain separate to operating procedures (to avoid confusion and distorted messages).

R3: The authority should ensure clear allocation of responsibilities between: Property Asset Management (Senior Technical Services Manager); operational Property Management (Property Manager), along with clear operational Facilities Management responsibilities (Deputy Property Manager). The principle purpose and accountabilities in each of these three job descriptions should be made clear (and possibly with a change of job titles to Head of Estates; Property Manager and Facilities Manager). These responsibilities should be explained in the Property Asset Management Plan and in related Job Descriptions & Structure Charts. Furthermore, any instructions from the Chief Legal & Governance Officer should be confined to matters relating to the estate.

R4: The authority should consider establishing a Corporate Property Asset Management Group (possibly chaired by the Director of Service Support) and comprising area managers and representatives from each client department; supported by Finance, IT and Procurement. This group should meet perhaps twice per annum, producing an annual report to the Management Board; with Property Asset Management and Property Management functions formally reporting to this group under a Performance Management Framework.

R5: The authority should adopt RICS Public Sector Property Asset Management Guidelines – 2nd Edition as a recognised source of good practice and establish a project (possibly overseen by the Corporate Property Asset Management Group) to systematically implement all sections of the guide. Progress should be tested against the Property Asset Management

Maturity Matrix within the RICS guidelines with the aim of achieving at least a "Competent" level (see extract at Appendix B) within a suggested timeframe - end of 2021/22.

R6: The authority should use the results from the Property Asset Management Capability Assessment Model (PAM/CAM) self-assessment exercise and the findings / recommendations in this report to develop a detailed continuous improvement project plan. Formal progress reporting and project governance should be established.

R7: The authority should establish an effective Performance Management Framework and reporting regime on Key Performance Indicators, the Capital Programme, Condition Survey Improvement Works, Planned Preventative Maintenance programme (including compliance inspections, servicing and any backlog) and reactive Repairs & Maintenance. An annual customer satisfaction survey should feature within the Framework. (Without such a Framework, the authority is unable to effectively manage property assets and take meaningful decisions).

R8: The authority should undertake a gateway review of the SOTER project to-date; introduce formal project management and governance arrangements; confirm project scope, determine the base data to be gathered, maintained and why; define the format and standards to be applied to ensure consistent quality; determine the level of detail necessary for each type of data; map the source of data and ensure processes exist for consistent updating and recording. Key Performance Indicators and management reporting requirements should also be defined bearing in mind any future possibility for benchmarking property assets. This recommendation is particularly important given the impending departure from the authority of the officer currently leading the implementation of SOTER and the risks this poses to the project.

R9: The authority should arrange a meeting of the Regional Estates Management Forum with the specific purpose of identifying any existing in-house professional expertise that could potentially be cost effectively shared, or to identify opportunities for aggregating demand and economies of scale to justify a shared recruitment exercise. The meeting should also consider any opportunities for aggregating demand for professional services that could be competitively tendered.

R10: The authority should, as a priority, undertake a fundamental revision of the team structure and reporting lines, all Job Descriptions (including the Senior Technical Services Manager through to Caretakers), person specifications, SMART personal targets and objectives to ensure responsibilities are clearly defined and re-aligned to ensure resource synergy and good quality service delivery. It is recommended that the RICS Public Sector Property Asset Management Guidelines are used as the basis for redefining management roles and responsibilities.

R11: The authority should provide at least the minimum level of resources necessary to enable the property team to deliver a reasonable level of service and thus consider:

- converting an existing temporary Admin Assistant role to a permanent role
- converting the existing job share Compliance Officer role into a permanent full-time role
- convert the existing Building Contracts Manager role into a Facilities Officer & Minor Projects role
- recruiting one experienced Technical Officer (ideally with some knowledge of electrical and mechanical) to support the PPM process – possibly on a 2-year fixed term contract pending any review by the incoming Mayor of West Yorkshire

R12: The authority should establish a structured training and continuing professional development (CPD) programme for the Property team, using an appropriate source of material and learning. The Institute of Workspace and Facilities Management (iwfm) Professional Competencies Guide provides an industry baseline, and one good source for continuing professional development. The attainment of formal qualifications should be a requirement against present day industry standards e.g. Diploma in fire door management.

R13: The authority should require the Procurement Manager to review legacy contracts & associated specifications with Consultants / Contractors (excluding new build projects) to ensure appropriate service levels & key performance indicators. The review should consider ways of easing the burden on the Property team by transferring more responsibility to Consultants / Contractors for self-reporting against performance criteria, planning and assurance; and also consider potential savings to off-set the costs of recruiting an in-house Technical Officer.

R14: The authority should commission team building support for the Property team and for facilitating endorsement of the new job descriptions and person specifications prior to implementation. The team building process should ensure a common vision, acceptance of roles, responsibilities, change and confidence building. Perceived barriers between managers and staff and between roles should be reduced / eliminated.

R15: The authority should explore the potential cost benefits of participating with WY Police in their impending tendering process to refresh the Police's existing helpdesk service. A procurement "Lot" could be specified, tendered and priced for WYFRS to enable the "Lot" to be accepted or rejected without adversely impacting Police. If the cost benefits were sufficient for the tender to be accepted, the existing arrangements and funding with Managing Agents would need to be fundamentally reviewed along with the responsibilities

of in-house property admin staff. A formal Change Management Project would need to be established to realise maximum benefits. If the cost benefits were insufficient and the tender was not accepted, then the authority would need to consider alternative means for improving the helpdesk function.

R16: The authority has ambitious capital funded plans for Keighley (contracts already awarded), Cleckheaton, Huddersfield and Halifax fire stations and the redevelopment of FSHQ (Birkenshaw). The authority should require the Procurement Manager to develop a procurement strategy for the new build programme that considers the various procurement options e.g. Traditional, or Design & Build or 2 Stage Open Book. If the latter strategy is adopted this would require early contractor engagement and an integrated project team (probably led by a multi-disciplinary firm of architects). The various strategy options need to be articulated and agreed as-soon-as-possible to ensure value-for-money construction outcomes. The strategy also needs to balance use of local contractors with value-for-money and supply chain risk.

R17: The authority should ensure existing staff in the property team structure are being deployed as efficiently as possible and any spare capacity is realised to best effect. To this end, it is recommended that the Senior Technical Services Manager permanently relinquishes line management responsibility for Transport and non-property related Technical Services to enable dedicated focus on Property Asset Management.

R18: The authority should consider extending the role of caretakers to include all sites (not just HQ and SDC) and expanding the duties undertaken to include (but not limited to) microwave leakage testing using a handheld device; replacement of more types of light bulb & tubes, plant room inspections, linear drainage / gutter clearance and portable equipment testing (PAT) at stations (but awarding high-volume testing at HQ and SDC to a contractor). Inspections and testing should be scheduled according to risk assessments, rather than adopting a "one size fits all" approach.

R19: The authority should consider extending the range of regular routine checks undertaken by fire station personnel to include (but not limited to) recording monthly water temperature readings [for safeguarding against legionella] and monthly test of panic alarms [lifts and DDA toilets].

R20: The authority should maximise the number of Bundled contracts in order to increase efficiency and improve contract management, starting with:

> **Mechanical & Electrical Installation and Maintenance** – currently many individual contracts with various start / end dates and currently with

electrical services being tendered separately to mechanical services; yet both are inter-related.

Boilers: currently installation, upgrades and maintenance are being awarded to different contractors.

CCTV / PAC / Intruder Alarms / Fire Alarms – currently involving 3-4 contractors.

Each of the above examples should be Bundled and awarded to a single contractor; with any existing contracts being subsumed into the main contract upon their expiry.

R21: The authority should review each of the contracts currently placed with Managing Agents to ensure clear service and reporting standards, clear roles and responsibilities and that WYFRS is receiving value-for-money. The review should also consider to what degree these services could be in-sourced and when (perhaps as part of career development and training plans) or whether they could be provided through shared service arrangements.

R22: The authority should undertake a review of all Planned Preventative Maintenance specifications and related routine schedules with a view to identifying low level tasks that could be competently undertaken more cost effectively in-house and then for the necessary processes and resources to be put in place; with supplier contracts being amended accordingly.

R23: A Property Asset Condition Survey should be tendered to the market as soon as possible. The appointed consultants' brief should require them to undertake condition surveys of external and internal structures & fabric; mechanical and electrical installations; but extended to include compliance with health & safety, fire regulations and other legal compliance requirements. The consultants should also be required to validate or update SOTER records on installations at each site e.g. make and model of gas boilers. The individual site reports should be combined into a costed 10-year programme of works adjusted as necessary to fit within a smoothed 10-year budget forecast. To ensure efficiency, the consultant should also produce work packages for the first 2 years of works that enable the authority to seek competitive quotations and thus result in value-for-money outcomes e.g. a work package to undertake all boiler related work; another to perhaps address all external hard surfaces etc.

R24: The authority should adopt Life Cycle Costing as standard practice for new build and major refurbishment schemes and for consultants' terms of reference to incorporate this requirement. Whilst ICMS 2 is one potential standard to adopt in this regard, there are others to consider e.g. CIPFA, ISO 15686 etc. Whichever standard is adopted, this should be written into PMU standard operating procedures and procurement specifications.

R25: The authority should require Property Asset Management to develop a Service Level Agreement (SLA) in consultation with client departments that explains the purpose of the Property team, the level of service clients can expect and key performance indicators that will be reported to clients on a regular basis. The SLA and performance reports should be published and maintained on Firespace with access by clients.

R26: The authority should ensure clear responsibility for managing document libraries, content and review and retention periods. Existing content should be reviewed and updated to address reported issues.