

Asset Management Plans

by

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Asset Management Plans

Aims of AMPs are to:

- **Develop a planned and fair approach to capital allocations**
- **Achieve improvements in educational standards**
- **Produce greater efficiency in the use of capital**

Asset Management Plans

Main Drivers:

- **New Schools Framework**
- **Need to overhaul capital allocation system**
- **Delegation and devolution**
- **New money**

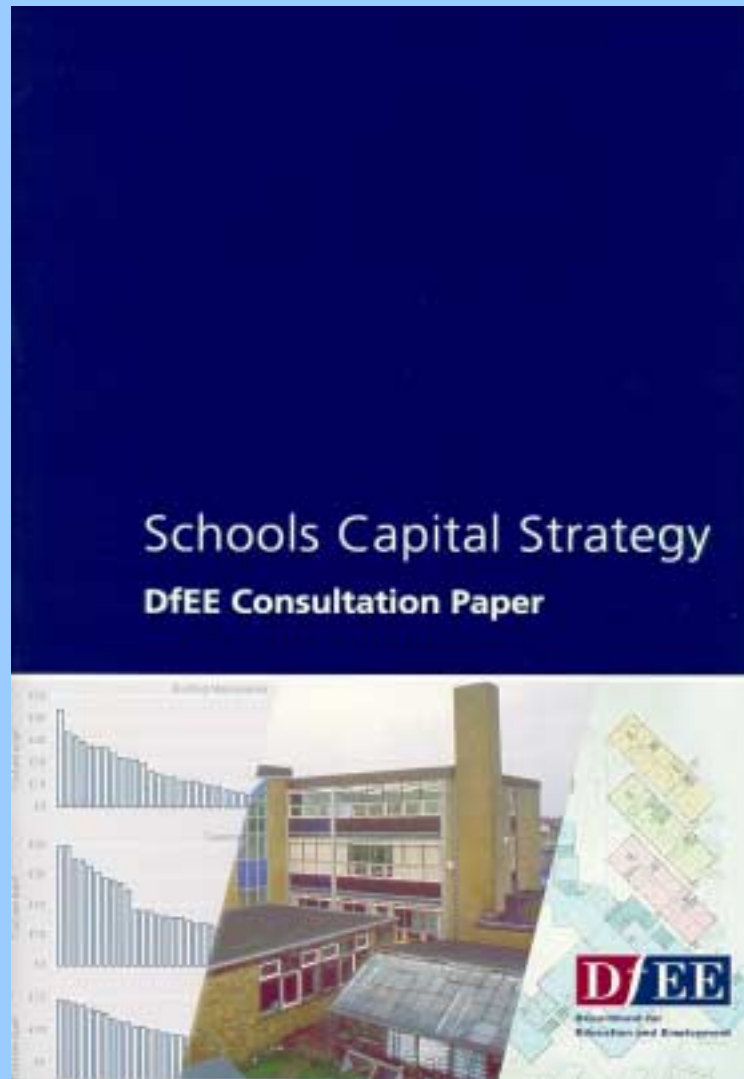
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Capital Spending in Schools (1998-99 to 2001-02):

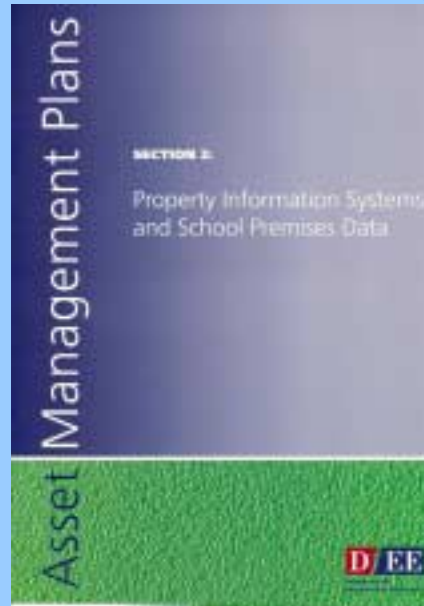
£ billion

Capital Baseline	2.5
New Deal for Schools	1.0
Comprehensive Spending Review	1.4
Public Private Partnerships	1.1
Class Size Reduction	<u>0.2</u>
	<u>6.2</u>

Asset Management Plans



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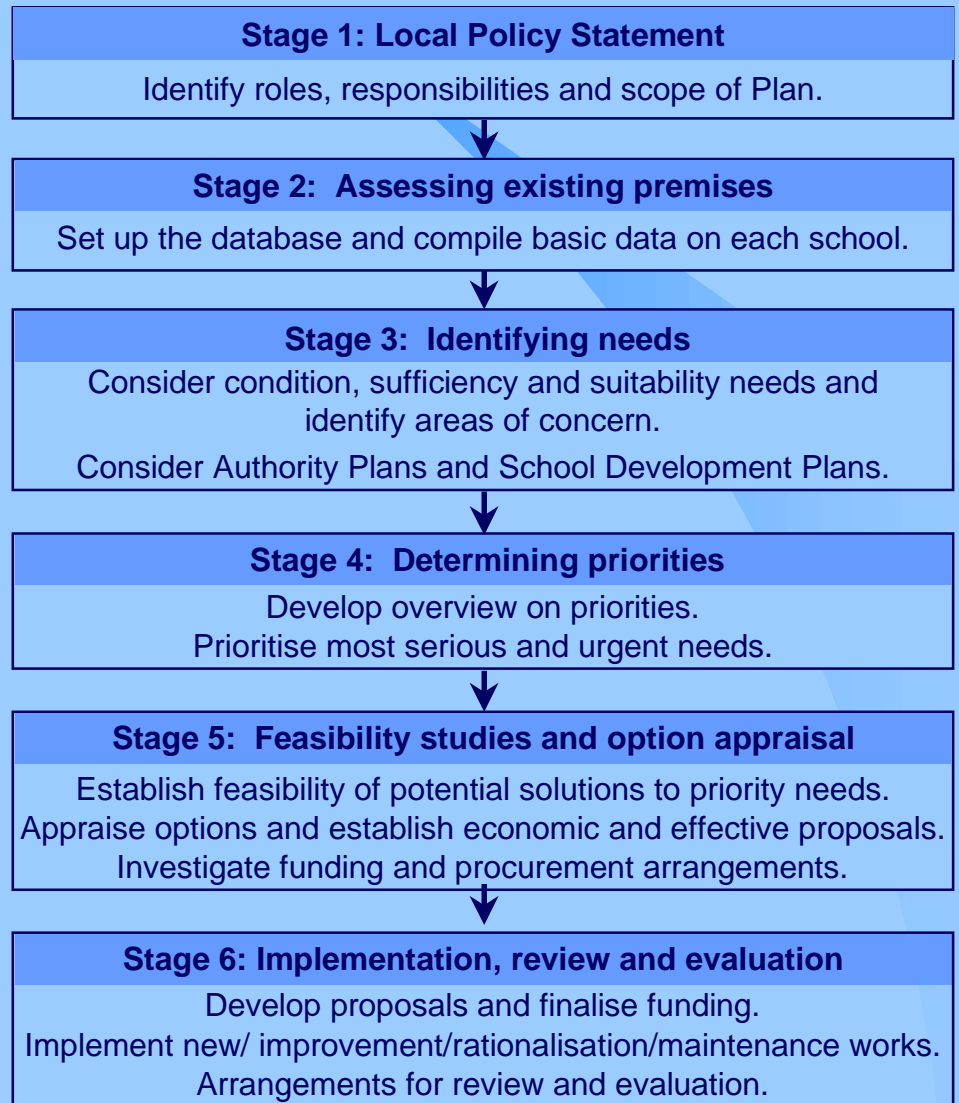


Asset Management Plans

- **Section 1 - Framework**
- **Section 2 - Property Information Systems and School Premises Data**
- **Section 3 - Condition Assessment**

Asset Management Plans

Section 1: Framework: Main stages in developing an AMP



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Section 1: Framework: *Aims*

“Set out the information needed, and the criteria used, to make decisions about spending on premises which will:

- raise standards of education;
- provide sustainable and energy efficient developments;
- provide innovative design solutions;
- increase community use of schools;
- maximise value for money;
- ensure effective use of new and existing capital assets.”

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Section 1: Framework: *Objectives*

- Provide an agreed basis for local decisions on spending priorities
- Help schools by making the decision making process transparent
- Help deliver public private partnership projects
- Provide assurance that capital allocations are soundly based

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Section 1: Framework: *Scope*

- Covers all maintained schools
- Covers all significant capital and recurrent expenditure on premises

Timescale

- 5 years

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Section 1: Framework: *Roles and Responsibilities*

Schools should:

- include their buildings within the context of their School Development Plan and identify priorities
- act as responsible custodians of their premises
- plan and budget with AMPs in mind
- co-operate with their LEA in developing the AMP

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Section 1: Framework: *Roles & Responsibilities*

Authorities should:

- manage the supply of school places and deliver the capital programme
- treat all schools fairly when prioritising
- maintain an effective dialogue with schools about the link between investment and outputs, both physical and educational
- monitor schools in carrying out their responsibilities to maintain their buildings
- give advice and collect and process information

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Section 1: Framework: *Roles and Responsibilities*

DfEE should:

- consult on development of AMP guidance
- establish national standards for AMPs, and issue guidance
- oversee development of AMPs
- appraise each LEA's AMP

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Section 2: Property Information Systems and School Premises Data

- **Covers information needs in relation to existing IT infrastructure**
- **Authorities asked to consider:**
 - information inputs and outputs
 - identify differences between present and future needs
 - technical standards
 - skills needed
 - requirements of other users

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Section 2: Property Information Systems and School Premises Data

Technical considerations:

- compatible with computer aided design packages
- integration with word processor and spreadsheets
- database selection
- system access
- security

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Section 2: Property Information Systems and School Premises Data

DfEE data requirements:

- school number
- gross area
- site area
- energy and water

Communications with DfEE

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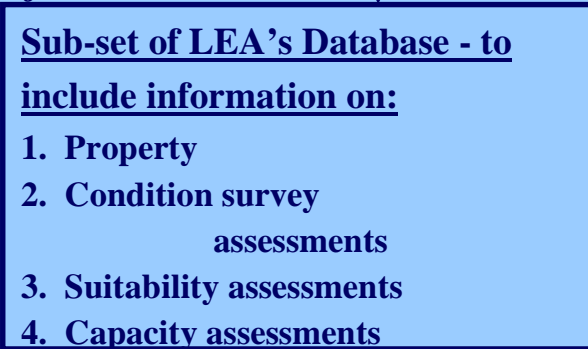
Section 2: Property Information Systems and School Premises Data

LEA DATABASE

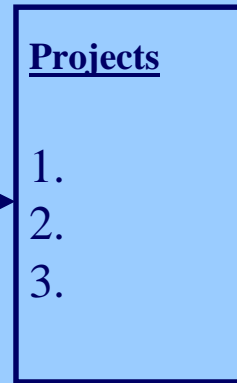


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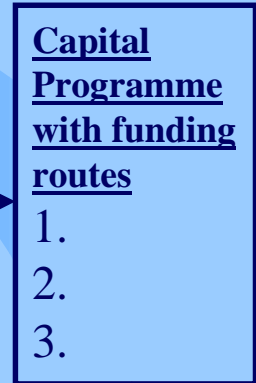
DfEE DATABASE



PRIORITISING



OPTIONS APPRAISAL



APPRAISAL BY DfEE OF LEAs' AMPs



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Section 3: Condition Assessment

Provides framework for assessment and covers:

- building type (related to age) and element classification (such as walls, roofs, electrical services)
- floor area definitions
- condition and priority classification
- repair / renewal costs

Explains data to be provided to DfEE

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Section 3: Condition Assessment

Condition grading:

- A - Good. Performing as intended
- B - Satisfactory. Exhibits minor deterioration
- C - Poor. Major defects
- D - Bad. Life expired

Priority grading:

- 1 - Urgent
- 2 - Essential
- 3 - Desirable
- 4 - Long term

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Section 3: Condition Assessment

Data to be supplied to DfEE

DfEE school number

1234

Date of survey

Jan 99

Base date of pricing (calender quarter)

1/99

Block reference number

A

Gross floor area (m2)

500

Type group

II

Block reference number

B

Gross floor area (m2)

800

Type group

III

Element

Condition Priority 1 Priority 2 Priority 3
category work (£) work (£) work (£)

Condition Priority 1 Priority 2 Priority 3
category work (£) work (£) work (£)

1. Roofs

C		5,000	2,000
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D	18,000		
---	--------	--	--

2. Floors and stairs

A			
---	--	--	--

B			2,500
---	--	--	-------

3. Ceilings

B			1,000
---	--	--	-------

A			
---	--	--	--

4. Ext'l walls, windows and doors

B		10,000	
---	--	--------	--

B			18,000
---	--	--	--------

5. Internal walls and doors

D	1,500		
---	-------	--	--

B		2,200	
---	--	-------	--

6. Sanitary services

A			
---	--	--	--

A			
---	--	--	--

7. Mechanical services

A			
---	--	--	--

C		7,500	
---	--	-------	--

8. Electrical services

B		2,000	5,000
---	--	-------	-------

B			3,500
---	--	--	-------

9. Redecorations

C		3,000	
---	--	-------	--

A			
---	--	--	--

10. Fixed furniture and fittings

B			1,800
---	--	--	-------

B		1,500	
---	--	-------	--

11. External areas*

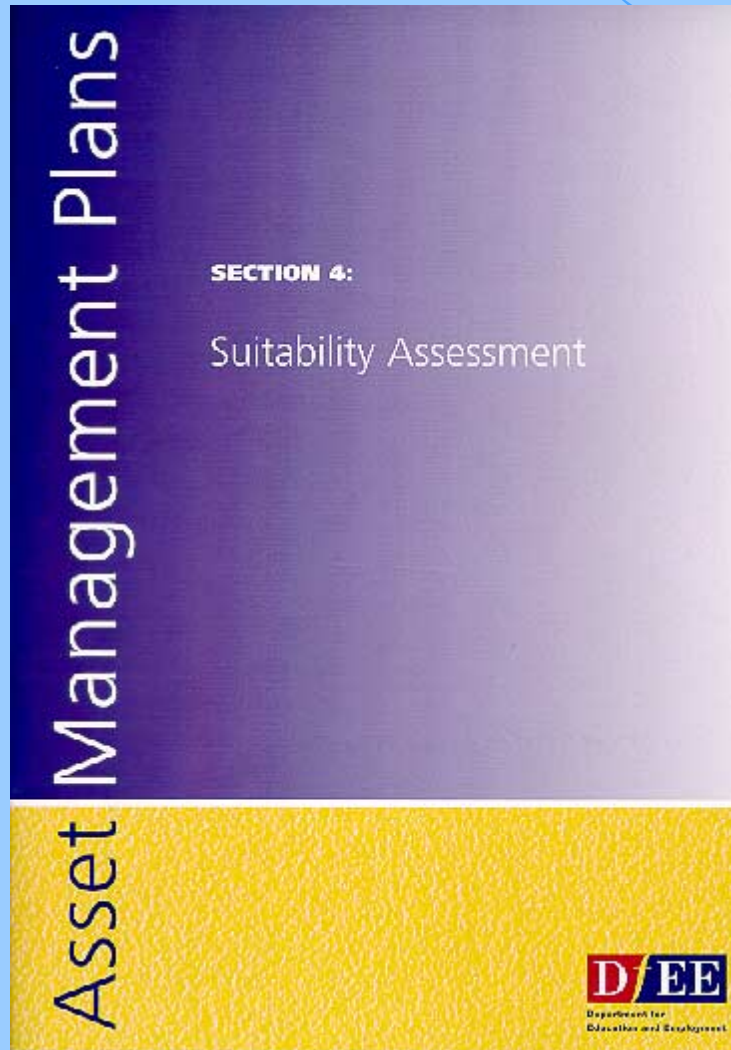
B			
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12. Playing fields*

B			1,500
---	--	--	-------

* For total site only - not attributed to individual buildings

AMPs Guidance - Section 4



SUITABILITY

Suitability is defined as how well premises meet the needs of pupils, teachers and other users and contribute towards raising standards of education

APPLICATION OF SUITABILITY ASSESSMENT

Covers the following main aspects of teaching and non teaching accommodation:

- number, size, shape and location of spaces
- environmental conditions
- fittings and fixed furniture
- information and communications technology (ICT) infrastructure
- health and safety/security issues

METHOD OF ASSESSMENT

- **Stage 1** - Room by room survey of spaces considered to be a problem
- **Stage 2** - Analysis and summary of information

ASSESSMENT CATEGORIES

- **Category A** - Unable to teach curriculum
- **Category B** - Teaching method inhibited
- **Category C** - Management or organisation of school affected adversely
- **Category D** - Pupil or staff morale or pupil behaviour affected adversely

Annex A : Survey Form

Stage 1:

Example 2: Secondary school

School name: Typical secondary school Sheet: 1

Spaces		Direct Impacts on Education				H&S/ Security			Comments					
Ref	Designation	Type			Category									
		Size/shape	Environment	Location	Fixed furniture	ICT infrastructure	A	B		C	D	High	Medium	Low
A03	Gen teachg	/					/							Too small
A07	Gen teachg	/	/				/							Too small and very hot in summer
A11	Gen teachg	/	/				/		/					Very hot in summer
A20	Gen teachg	/					/							Unsuitable shape
A15	Science lab			/				/						Remote from other labs
B04	Science lab											/		Hazardous benching layout
B11	Food technology			/	/		/							Isolated position and unsuitable equipment
D07	Control technology			/	/		/							Isolated position
A13	Staff room	/							/					Too small
D11	Materials store			/				/						Isolated position
C01	Main corridor	/						/				/		Too narrow
	Hard play areas	/						/						Small dispersed areas
	Car parking			/				/						Inadequate number of spaces

Annex B : Summary Form

Stage 2:

Section 4: Suitability Assessment

Example 2: Secondary school

School name: LEA / School No.

Space classification	Spaces				Direct impacts on Education				H&S/ Security			Comments	
	Existing	Optimum	Surplus	Shortfall	Impact	A	B	C	D	High	Medium		Low
1 General teaching	32	34	32	2	A	2	3	1	1				
2 Science	10	9											
3 IT	3	3											
4 Art	4	4											
5 Technology	5	6		1	A	1	1	1					Shortfall of Food space
6 Music	3	3											
7 Drama	2	2											
8 PE	2	2											
9 SEN	0	1		1	A								
10 Private study	2	2											
11 Hall	1	1											
12 Library	1	1											
13 Resource areas	5	5											
14 Common room	1	1											
15 Other (specify)													
16 Other (specify)													
17 Other (specify)	3	3											
18 Teaching spaces	74	77	1	4		3	4	2	1			1	
19 Staff and admin spaces			1	C			1	1					Shortfall of general office space
20 Pupil changing/toilets													
21 Teaching storage							1						
22 Kitchens/dining												1	
23 Ancillary/circulation							1						
24 Non-teaching spaces		1					3	1				1	
25 Playing fields													
26 Hard surfaced play areas													
27 Soft landscaped areas													
28 Access roads and paths													
29 Car parking							1						
30 External areas							1						
31 Provision for disabilities and special educational needs						2	1	1					

Residential accommodation and community use

No means of isolating areas in community use during evening and at week-ends

Quantification of loss from suitability problems

Lessons with group sizes larger than preferred - 200 teaching periods, average group size 28
 Lessons in inadequate spaces - 120 teaching periods, average group size 25
 Lessons in poor environment - 30 teaching periods, average group size 22
 Shorter lessons - 30 teaching periods, average group size 25
 Lack of disabled provision - 60 teaching periods, 5 pupils
 Poor quality recreational facilities - All pupils
 Increased workload for teachers - All teachers
 Adverse effect on staff morale - All staff

Basis of assessment Existing roll

Assessment date:

SUFFICIENCY

Sufficiency will cover:

- **capacity assessment**
- **measurement of area and grounds**
- **efficiency of use of buildings and land**

THE NEW CAPACITY ASSESSMENT METHOD

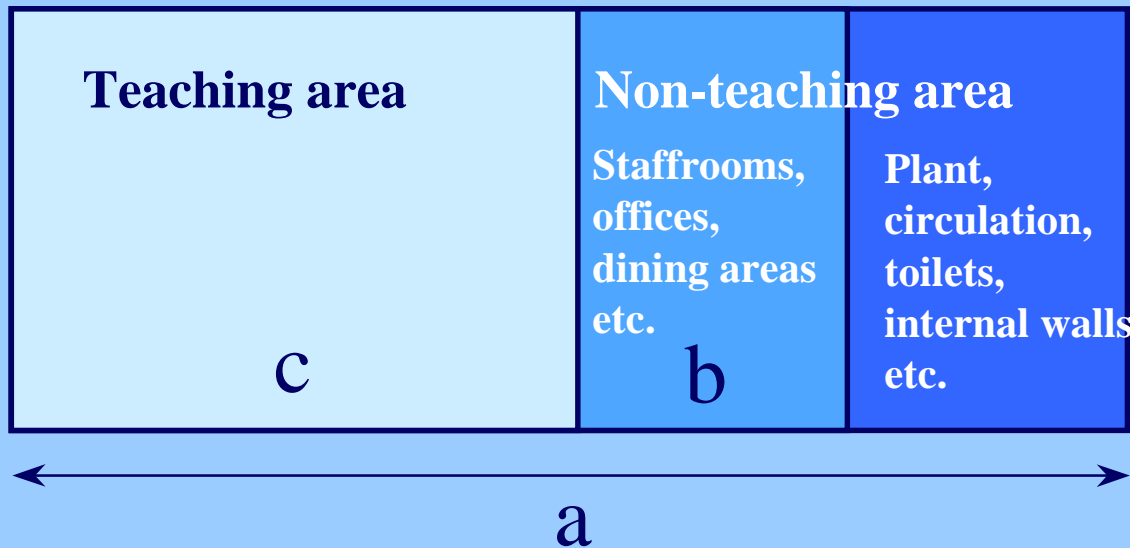
General principles:

- clear, robust, fair and transparent
- measure all usable space
- based only on physical attributes of the buildings and the age range of the school
- make realistic allowance for pupils with special educational needs
- ‘non school’ use of surplus space identified or discounted

CAPACITY ASSESSMENT

How many pupils can a building accommodate?

- gross area (a)
- usable (net internal) area (b+c)
- teaching area (c)



THE NEW CAPACITY ASSESSMENT METHOD

Key features:

- measuring 'Net Internal Area'
- determining total possible 'workplaces'
- working within a range, using utilisation and efficiency factors

SUFFICIENCY/CAPACITY ASSESSMENT

- **Consultation Paper to be published in December**
- **Guidance to be published early next year**

APPRAISAL OF AMPs

- **Appraisal is the key to AMPs and the new capital strategy**
- **DfEE will appraise each LEA's AMP every year**
- **Each LEA will receive a score (from 1 to 3) for its AMP:**
 - 1 - excellent**
 - 2 - adequate - but scope for improvement**
 - 3 - systems and processes need to be developed further**

APPRAISAL OF AMPs

Key elements of appraisal:

- examine the involvement of partners - churches, schools, governors etc.
- accuracy of data
- method of determining priorities
- implementation programme to achieve benchmark standards for value for money etc.
- quality of outcomes

APPRAISAL OF AMPs

- **Consultation Paper on Appraisal to be published by November 1999**
- **Guidance to be issued by April 2000**
- **Appraisal of full AMPs begins in March 2001**

POSSIBLE FUTURE AMP GUIDANCE

- **Effectiveness of building programmes**
 - **mid 2000**
- **Options Appraisal**
 - **mid 2000**

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Next steps

Milestones:

- November 1999: Appraisal draft guidance issued
- December 1999: Sufficiency draft guidance issued
- March 2000: Authorities provide premises and condition data
- September 2000: Authorities provide Sufficiency/Suitability data
- **December 2000: 90% of Authorities with operational AMPs**
- March 2001: begin appraisal of full AMPs