

## Trafford Council - Operational Estate Strategy

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## 1. Executive Summary & Introduction

This strategy sets Trafford Council's high level direction for the management of its Operational Estate for the period 2021 to 2026. It explains the overarching vision and guiding principles for decision making over this period and what is driving this approach. The strategy sets out the overall direction of travel for the assets within the 'Operational Estate', that is, those buildings the Council uses to deliver its services to Trafford residents.

As outlined in the RICS Public Sector Asset Management Guidelines, there are three core elements to the Property Asset Management planning process. These are:

1. The Property Strategy – “articulates our vision and what we want to achieve”
2. The Property Asset Management Plan - “articulates how we will deliver our vision”
3. The Property Asset Management Action Plan - “prioritised activity to delivery our vision”.

This document seeks to deliver items 1 and 2 and provide the basis upon which a Management Action Plan will be built.

This Corporate Strategy re-affirms the Councils **commitment to the 'Corporate Landlord'** approach; that is, a single approach to land and property asset management and decision making across the Council and will:

- Assist all Officers who are involved in property related issues to understand the corporate vision and their role in achieving this.

- Provide insight and support for Service Directors/Managers and Elected Members involved in decision making and influencing property or working space related projects.
- Assist our Public Sector Partners as we move forwards with our ambition to work more collaboratively.
- Form the basis for interaction with other key stakeholder groups including our Estates Management Service provider and Facilities Management providers.
- Considers the health, safety and wellbeing issues at all stages of asset management.

The **vision** for Trafford Council's asset management is,

*“To create an efficient, fit for purpose and sustainable estate to deliver better integrated public services across Trafford and to use our assets as an enabler for the reduction of running costs and the support of Council priorities.”*

The **key principles** of the Council's approach to property align with those of the Strategic Estates Group and the wider public sector. They are:

1. To have a sustainable and fit for purpose portfolio of assets.
2. To improve utilisation.
3. To reduce maintenance and running costs.
4. To minimise expenditure on private sector rented accommodation.
5. To support energy efficiency and the drive for carbon neutrality.
6. To have clear agreements relating to any third party occupation of Council space.

As the vision articulates, 'service need' is the key driver to how the Council's estate will develop. The action plans, to be developed from this strategy, will ensure the estate will be reviewed as a whole, in line with service needs. All recommendations for change will be managed via the governance laid out in section 4 and require business cases. Clearly, the financial context of the duration for this strategy demands that a strong focus is efficiency and value for money, but service delivery remains the key driver. It should be noted that although the document names various assets (sections 4.4 and 5) as it sets out its high level strategic direction, these statements come from recommendations already made in commissioned activity and are neither exclusive nor exhaustive. For example, no systematic review has covered Children's Services Buildings, such as Children's Centres and Family Time Centres and also Community Centres. These will form part of a further review and therefore be included in the action planning process that follows the adoption of the strategy.

## **2. Context**

### **2.1. Trafford Council Corporate Plan, Priorities and Modernisation<sup>1</sup>**

At the heart of the Council's vision is a common cause to make Trafford a better borough; a place where everyone has a chance to succeed and where everybody has a voice. The Council knows it has to do things differently as it cannot do it all and, by virtue of its democratic mandate, will lead the way in ensuring that this is a shared endeavour and that across Trafford there will be a more joined up approach to service delivery.

Through the vision,

**“Working together to build the best future for all our communities and everyone in Trafford”**

The Council is making a commitment to work together across different services and agencies to make the best use of its resources:

The Council identified seven strategic priorities in the corporate plan that it believes are crucial to enabling Trafford residents, businesses and staff to thrive. These priorities set out the aspirations for our people, place and communities, and how they can affect and improve their daily lives.

### OUR PRIORITIES



To deliver on the plan it is also necessary to develop the way we work given the ten years of austerity that the Council has been through and define the ‘Kind of Council We Want to Be’. There is a need to work smarter, make use of digital technology and collaborate with partners where we can. The Council takes a leading role in shaping how joined up services across the sector can best support the local area and people and is continuously shaping our culture, practices, processes and business models to respond to people’s changing needs and expectations. It is working to improve the way it delivers services to meet the needs of a modern Trafford. This is being done so that by 2023:

***The Council will be a people-focused, digitally enabled, commercially minded Council where our high-performing place based services will provide an excellent customer experience making the most of our assets in the borough.***

By setting out our plan, corporate priorities and the ‘Kind of Council We Want to Be’ supported by the modernisation programme the Council has solid foundations for the future.

The direct influence this Operational Estate strategy needs to pull from the Council’s priorities and modernisation are:

- Supporting place based services - to help people to access the right support at the times in their lives when they most need it and providing hubs of services
- Maximise the use of technology to transform the way we deliver services in all that we do
- Creating our working places to be inclusive, thriving places where people want to work and are proud to work
- Improving our own staff’s work/life balance and family life, so we can be a leader in this area

- Encourage and enable people to be more environmentally friendly in their daily lives

## 2.2. Trafford Together Locality Plan<sup>ii</sup>

The Trafford Together Locality Plan is Trafford Borough's blueprint for the transformation of health and social care over until 2024.

The Locality Plan sets out Trafford's System Principles, which form our way of working. These are:

- **Together as Partners** – co-ordinating across our system, thinking bigger and doing better with our combined resources to improve outcomes for residents.
- **In a Place** – being positive about our places and spaces, bringing people who live and work in an area together to build stronger communities.
- **With People** – putting residents at the heart of what we do, listening and working with people.
- **Focusing on Prevention** – commitment to taking action early and making every contact count.
- **Continually improving** – making the most of technology and using data and information to make shared decisions. We continue to learn and develop our workforce and make the best use of all our assets.

The Council's operational estate is the physical 'front door' for many residents to access Council and Health Care services and for many their first impression of the Council. In addition, the operational estate is the working space for those professionals delivering services at a place based level and the Locality Plan as a whole, and is increasingly used by our public sector partners.

The direct influence of the Locality Plan on this Operational Estate Strategy is the continued emphasis on working in partnership to make the most of the built assets we already have. In addition, as the Health and Social Care Recovery and Reform work streams progress, it will be via the Strategic Estate Group and Corporate Landlord groups that any new estate requirements will feed into the Property Action Plans.

## 2.3. Greater Manchester 5 Year Environment Plan & Public Sector Decarbonisation Scheme

Trafford Council declared a climate emergency in November 2018, in doing so, Trafford was placing itself amongst the forefront of local authorities, recognising that carbon reduction could not be left to Government and it is a matter for all of us and all organisations. The Council's Climate Change Scrutiny Committee Task and Finish Group is progressing and monitoring the work around a set of key tasks:

- (i) Seek advice from experts to develop a carbon budget and set a challenging target date for carbon neutrality in Trafford;
- (ii) Consider systematically the Climate Emergency impact of each area of the Council's activities;
- (iii) Make recommendations and set an ambitious timescale for reducing these impacts;
- (iv) Assess the feasibility of requiring all report risk assessments to include Carbon Emission Appraisals, including presenting alternative approaches which reduce emissions wherever possible;
- (v) Report to full Council with the actions the Council needs to take to address this emergency.

The estate management action plan will be strongly influenced by this work and carbon reduction will become a key factor in decision making through the governance set out in section 4.

There is also a wider Greater Manchester context to be noted. The inaugural Greater Manchester Green Summit was held in March 2019, at which the GM 5 Year Environment Plan was launched, outlining the necessary steps to be taken to achieve carbon neutrality in GM by 2038. The plan sets out actions it expects the local authorities in GM to take. The actions relevant to this strategy need to be taken account of in future estates projects and are as follows:

#### **Energy Supply**

- Will complete a full assessment of the potential of our assets for renewable energy and develop these assets (where financially viable) by the end of 2021.
- When replacing heating systems in buildings, will install low carbon alternatives where viable, seeking to avoid carbon intensive technologies (gas, coal, oil).

#### **Homes, Workplaces and Public Buildings**

- Standardise measurement and reporting of the operational efficiency of their buildings.
- GMCA and LAs will aim to obtain an average DEC of rating D or better by 2024 and C or better by 2030 for their public buildings where economically viable.

#### **Production & Consumption of Resources**

- Embed environmental sustainability criteria in social value procurement mechanisms.
- Provide Carbon Literacy for all staff involved in procuring activities.
- Aim to eradicate avoidable single use plastic on the public estate.

#### **Natural Capital**

- Build natural capital into projects to maximise the value that the environment brings including on estates and land.

Again, it is important that the above elements are firmly noted by all those working with the estate and are weaved into the Property Asset Management Action Plan that will follow from this strategy.

In late 2020, the Department for Business, Energy and Industrial Strategy (BEIS) launched the Public Sector Decarbonisation Scheme. The scheme will see £1bn of grant funding being invested in capital energy efficiency and heat decarbonisation projects within public sector non-domestic buildings with the aim of halving carbon emissions from the Public Estate by 2032. Trafford Council has collaborated with the Greater Manchester Combined Authority and the authorities across GM to submit a bid.

A successful Salix Skills Fund application was submitted in October, providing circa £983k across GM to carry out the necessary detailed survey work to inform a robust capital bid. Subsequently, the capital bid was submitted by GMCA Environment Team on 23rd November 2021, with a total value of £80.7m, £4.3m of which was for buildings in Trafford, submitted at 100% compliance with the Salix toolkit and funding criteria, meaning that no match funding would be required if the bid is approved as submitted. Due to the maximum value of the direct award being capped, resources for feasibility surveys had to be distributed equally among the Councils involved. Trafford was therefore allocated consultants to carry out surveys at 14 buildings in Trafford, as detailed in tables 1 and 2 below. These assets were chosen due to having been assessed as the most energy hungry buildings within the estate.

**Table 1: Corporate buildings**

Trafford Town Hall – LED
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Sale Waterside – LED
Stretford Children’s Centre – Heat Pump and Solar PV
The Kindle Children’s Home – Solar PV
Shawe View Respite Centre – Heat Pump, Solar PV and LED
Lynwood Lodge Care Home – Heat Pump and LED
Partington Children’s Centre – Heat Pump and Solar PV
Old Hall Rd Children’s Home – Solar PV

**Table 2: Schools**

Stretford Grammar School – Heat Pump/Solar PV
Victoria Park Infants & Jnrs - Heat Pump/Solar PV
Woodheys Primary School - Heat Pump/Solar PV
Sale High School - Heat Pump/Solar PV
Delamere School - Heat Pump/Solar PV
Trafford Alternative Education Centre – Solar PV

Following submission of the capital bid in November, it is anticipated that a bid outcome will be known in mid-January 2021. If successful, the project has a delivery and spend deadline of the end of September 2021. It is hoped there may be other opportunities to make further bids to the fund in the future and there is a need for Trafford to strengthen its strategic approach to carbon reduction across the estate, through the action plans resulting from this strategy.

## 2.4. One Public Estate and the Strategic Estate Group

The One Public Estate (OPE) programme from central government started in 2013 and encouraged all public sector bodies to work together to form projects that would deliver the following outputs:

- New homes
- New jobs
- Capital receipts
- Reduction in running costs
- Inward investment.

Trafford received a small amount of funding from OPE in 2018 which contributed to the Locality Asset Review (LAR); a piece of work which assessed what the public sector had in terms of assets across the borough, what it needed, and how to get from the current state to the future state.

Trafford Strategic Estate Group (SEG) is the partnership that is responsible for the joint strategic direction and project delivery for the public sector estates assets across Trafford. The group is made up by the main public sector partners within Trafford and includes Trafford Council, Trafford CCG, Manchester Foundation Trust, Trafford Local Care Organisation, Greater Manchester Mental Health Trust, the GMCA. There are also representatives from across the public sector and include experts in housing and commissioning. The group has a delivery plan, which has been informed by the Locality

Asset Review and continues to adapt as system requirements change. The delivery plan is regularly reviewed to ensure that the projects slated for delivery are the projects the system does indeed require at this time and that we can adapt to changing circumstances, such as Covid19.

As the Council is one of the major partners in the SEG, this Operational Estate Strategy will inform the SEG delivery plan and the actions arising from it will impact on the group, especially those partners co-located with the council.

## **2.5. Trafford Council's Value Framework**

Trafford Council has developed a values framework which outlines the key behaviours that are essential to effective performance at Trafford. This framework will form the basis of all our people and business processes and provide us all with a common language for how we go about our daily work. The framework will ensure that there are clear expectations of everyone working at Trafford irrespective of their role or their level of seniority.

Trafford Council's values are:

- **Empower**
- **People Centred**
- **Inclusive**
- **Collaborate**

For this strategy to be successfully delivered it needs to not only align itself with the values framework but also contribute to delivery of the organisational culture, by assisting in the creation of working and service delivery spaces that meet these values.

## **2.6. Trafford Council's budget position<sup>iii</sup>**

Since 2010 savings of £145m have been made to Trafford council services as a result of the UK central government's austerity programme. It is expected that such pressure to make savings will continue into the early 2020's, notwithstanding the increasing demands on Council services, especially adults and children's social care, which will be further exacerbated by the effects of Covid19.

The outbreak of the COVID-19 pandemic in March, has had far reaching impacts for the economy and communities of the Borough and on the way Council services are delivered and has brought many financial challenges. It has rightly been the overriding focus for the Council, beginning in March 2020 and into 2021, but throughout this time it has been essential we did not lose sight of those overriding priorities set out in the Corporate Plan. Instead Covid-19 must provide a further catalyst to develop and build on new ways of working and opportunities identified in Response and to build back stronger during the Recovery Phase.

This strategy and the actions deriving from it needs to be mindful of the pressures upon the Council's finances and the subsequent need to improve the efficiency of the estates and make good value strategic decisions which will lead us to a sustainable position.

## **3. Strategic Purpose**



The role of this strategy is to take the information in the preceding sections and digest it into a clear vision for the future, giving a set of principles from which the leaders, elected members and officers of the Council can work to progress the Council's priorities in this area of work, so as to make the vision reality.

### **3.1. Vision**

*“Our vision is to create an efficient, fit for purpose and sustainable estate to deliver better integrated public services across Trafford and to use our assets as an enabler for the reduction of running costs and the support of Council priorities.”*

### **3.2. Key Principles**

The key principles of the Council's approach to property align with those of the Strategic Estates Group and the wider public sector.

1. To have a sustainable and fit for purpose portfolio of assets.
2. To improve utilisation.
3. To reduce maintenance and running costs.
4. To minimise expenditure on private sector rented accommodation.
5. To support energy efficiency and the drive for carbon neutrality.
6. To have clear agreements relating to any third party occupation of Council space.

These key principles require those colleagues working in property related roles to work with services as a critical friend to challenge current perceptions of property need, provide examples of best practice and collaborate to find solutions that help to deliver our property vision.

Collaboration with partner organisations across the public, private and voluntary sector is also vital so we can explore additional possibilities for shared use of property and joint working initiatives that benefit the public sector system within the borough.

## **4. The Council's Operational Estate and Governance**

### **4.1. Background**

The Council's overall land and property portfolio consists of circa 316 land and property assets, which are a mixture of offices, educational premises (schools are subject to separate funding arrangements) community buildings and a range of commercial/investment properties and land. Of this portfolio, 28 assets are considered to be the 'operational estate', that is the buildings which Trafford Council has control over and from which it delivers its services.

The Council's Estates and Facilities functions are contracted out to Amey, in Lot 3 of the Provision of Environmental and Infrastructure Services contract that commenced in 2015. At this time the Council moved over to a Corporate Landlord model, which saw the functions around property and workspace management centralised. This model allows for service managers to concentrate on managing their services and to call upon property expertise when required, rather than manage a building as part of their role.

The Long Term Accommodation Programme; a rationalisation of the Council's administrative buildings starting in 2011 saw a number of teams move into a refurbished Trafford Town Hall and the remaining sites disposed of.

There are, in addition, some assets where the Council has entered into partnership with another organisation for the management and maintenance of the building. These partnerships can be quite different. The most significant example is the Private Finance Initiative Agreement for Waterside House, Sale, signed in 2002 which saw the construction of a modern office block, incorporating the library and Arts Centre at the rear of a refurbished Town Hall and has Engie providing facilities management services until 2028/9. Contract monitoring and management is in place until the end of the agreement period. There is a requirement for the Council to develop an exit strategy for the expiry of the agreement and will be included within the action planning process.

A different example of working in partnership is Coppice Library in Sale, where BlueSCI, a Community Interest Company delivering mental health services, manages and maintains the building owned by the Council. The Council continues to delivery library and customer services from this site. (For the purposes of this strategy such buildings are not considered the 'operational estate'.)

As a result of the Long Term Accommodation Programme and working in partnership with others, Trafford Council has a relatively modest portfolio of operational assets, when compared to most other metropolitan boroughs.

## 4.2. The Council's Operational Estate

The Council's operational estate consists of:

	Asset	Function	Neighbourhood
1	Trafford Town Hall (incorporating library)	Main administrative base	North
2	Waterside House (incorporating Sale Library, Talkshop and Arts Centre)	Main administrative base & arts centre	Central
3	Moss View	Administrative base for the Traded Services Team	West
4	Altrincham Town Hall	Venue for hire	South
5	Flixton House	Venue for hire	West
6	Claremont Centre	Accommodates Trafford Music Service	Central
7	Partington Healthy Living Centre (incorporating Partington Library)	Accommodates Partington Library and offers some community services	West
8	Shawe View	Respite care centre	West
9	Stretford Children's Centre & Early Help Hub (incorporating Partington Day Nursery)	Children's centre and services	North
10	Partington Children's Centre & Early Help Hub	Children's centre and services	West
11	Sanyu Daycare Centre	Nursery	North
12	Family Contact Centre	Social Services Contact Centre	South
13	Hayswater Contact Centre	Social Services Contact Centre	West

14	Ascot House	Residential Intermediate Care Facility	Central
15	Kindle Lodge	Residential Home	West
16	Old Hall Road	Residential Home	North
17	Partington Community Centre	Community Centre	West
18	Riddings Centre	Community Centre (current temporary Timperley Library)	South
19	Sale West Community Centre	Community Centre	Central
20	Trafford Park Depot	Environmental Services Depot (Redundant)	North
21	Altrincham Library	Library	South
22	Hale Library	Library	South
23	Old Trafford Library	Library	North
24	Stretford Library	Library	North
25	Timperley Library	Under redevelopment	South
26	Urmston Library	Library	West
27	Woodsend Library	Library	West
28	Trafford High School (incorporating Trafford Medical Education Service)	Pupil Referral Unit	South

As described in section 2.3 the Council has agreement to co-locate with its partner organisations. This means that other public sector organisations use back office space within the Council's main administrative bases, but also that the Council's community delivery teams' use working space in buildings owned and controlled by partner organisations.

Council staff use the following additional locations when delivering Council services:

Asset	Partner Organisation	Function	Neighbourhood
Meadway Clinic	Manchester Foundation Trust (MFT)	24/7 Health and Social Care Hub & Administration office	Central
Partington Health Centre	MaST LIFT Co. Operated by Community Health Partnerships	Health Centre	West
Cornhill Clinic	MFT	Administration office	West
Tatton House	Amey	Depot and administration office	Manchester
Altrincham Health and Wellbeing Centre	NHS Property Services	Administration office	South
Wythenshawe Hospital	MFT	Hospital	Manchester

### 4.3. Corporate Landlord and Capital Programme

The Corporate Landlord Function is split to form a Strategic Group and an Operational Group. These groups link through to all levels of the organisation (and partners where relevant) via all directorates providing representation on the groups and via user groups attended by staff. The strategic group meets quarterly and the operational group monthly. The terms of reference are included in

Appendix 1. Any emerging issues that cannot be resolved by the operational group are escalated to the Strategic Group for resolution.

The Strategic Group has overall responsibility for:

1. Developing and implementing a corporate approach to the management of assets across the integrated Council/CCG.
2. Taking a strategic view of the capital programme and asset management (including repairing and compliance obligations) and managing the implementation of the agreed asset strategy and asset management plan.
3. Ensuring that asset plans are consistent with the principles of One Public Estate and the Locality Asset Review.

The Operational Group has overall responsibility for:

1. Devising and delivering an action plan with regards the Council's operational properties throughout the subsequent 12 months, in line with the strategy devised by the Strategic Group.
2. Resolving or escalating any operational issues put forward by the User Groups.
3. Delivering any new strategies put forward by the Strategic Group, via the use of Task & Finish Groups
4. Ensuring delivery of the Corporate Landlord capital programme on budget and on time.

Annually, the Council proposes a capital programme and land sales programme to its Executive, which sets out the investment required for the maintenance of buildings and the land and property assets that it seeks to dispose of.

#### 4.4. The Strategic Review of the Operational Estate

In July 2020 the Council commissioned a strategic review of the operational estate to look at a concentrated set of assets; reviewing the Council's use of each so as to inform a view on the opportunities for better management. The operational review looked at 11 of the Council and its partners' buildings:

	<b>Asset</b>	<b>Function</b>	<b>Neighbourhood</b>
1	Trafford Town Hall (incorporating library)	Main administrative base	North
2	Waterside House (incorporating Sale Library, Talkshop and Arts Centre)	Main administrative base	Central
3	Moss View	Administrative base for the Traded Services Team	West
4	Altrincham Town Hall	Venue for hire	South
6	Claremont Centre	Accommodates Trafford Music Service	Central
7	Partington Healthy Living Centre (incorporating Partington Library)	Accommodates Partington Library and offers some community services	West
8	Shawe View	Respite care centre	West
9	Kindle Lodge	Residential Home	West

10	Trafford Park Depot	Environmental Services Depot (Redundant)	North
11	Meadway Clinic	24/7 Health and Social Care Hub	Central
12	Partington Health Centre	Health Centre	West
13	Cornhill Clinic	Administration office	West
14	Tatton House	Depot and administration office	Manchester
15	Altrincham Health and Wellbeing Centre	Administration office	South

The operational review made the following overall recommendations:

Theme	Detail
Performance Management	Insufficient Resource and lack of customer service within the property function.
Systems and Information	Lack of systemised information leads to a lack of visibility of issues and timely reporting to the Council.
Investment Requirement	Lack of visibility of the total investment requirement across the estate.
Leases and Licences	Requirement for all non-Council occupation of buildings to be formalised.
Potential cross subsidisation	Lack of formal agreements of third party occupation leads to unclear financial arrangements with other organisations.

The operational review highlighted the following opportunities:

Asset	Opportunity
Trafford Town Hall	<ul style="list-style-type: none"> <li>• Confirm as the main administrative base.</li> <li>• Formalise arrangement with partners over use of space, including storage space.</li> <li>• Identify opportunities to relocate teams from or to other operational assets and with the advent of greater agile and home working rationalise space across the administrative estate.</li> </ul>
Waterside House (incorporating Sale Library, Talkshop and Arts Centre)	<ul style="list-style-type: none"> <li>• Confirm the position of the use of the asset as a secondary administrative base into 2 phases: <ul style="list-style-type: none"> <li>○ Until the end of the PFI agreement</li> <li>○ After the PFI agreement ends.</li> </ul> </li> <li>• Set out a carbon reduction programme for this asset that aligns with the 2 phase plan.</li> <li>• Formalise arrangement with partners over use of space, including storage space.</li> <li>• Identify opportunities to relocate teams from or to other operational assets and with the advent of greater agile and home working to rationalise space across the administrative estate.</li> </ul>
Moss View	<ul style="list-style-type: none"> <li>• Seek to vacate this asset, demolish and redevelop the site.</li> <li>• Conduct an options appraisal to compare the opportunity to relocate the team and functions based within Moss View to the Trafford Park depot, as opposed to the other parts of the administrative estate, to judge which would be of greater financial and operational benefit to the Council.</li> </ul>

Altrincham Town Hall	<ul style="list-style-type: none"> <li>Complete an options appraisal to identify what the options are for better use of the part of the building which remains in Trafford Council control.</li> </ul>
Claremont Centre	<ul style="list-style-type: none"> <li>Seek to relocate the music service and dispose of the site, alongside the adjacent Council owned site on Chapel Road.</li> <li>Clarify the potential opportunity presented by the relocation of Stretford Library into Stretford Mall, to provide a new purpose for a building of community interest.</li> </ul>
Partington Healthy Living Centre	<ul style="list-style-type: none"> <li>Put formal tenancy arrangements in place to ensure provision of services meets the community need.</li> </ul>
Shawe View	<ul style="list-style-type: none"> <li>Review the future retention/use of the property from an Estates perspective and support in respect of aiming to reduce costs and overheads for these facilities.</li> <li>Consider bringing the management of this property into the Corporate Landlord portfolio.</li> </ul>
Kindle Lodge	<ul style="list-style-type: none"> <li>Clarify the opportunity to use agile and home working within the teams at this location to rationalise space elsewhere in the administrative estate.</li> </ul>
Trafford Park Depot	<ul style="list-style-type: none"> <li>See the recommendation under Moss View.</li> </ul>
Meadway Clinic	<ul style="list-style-type: none"> <li>With the Council's health partners, seek to review the working requirements for the 24/7 services offering from this building and any additional services that would benefit from colocation. Work as a partnership to identify options.</li> </ul>
Partington Health Centre	<ul style="list-style-type: none"> <li>Review the opportunity of greater agile and home working to provide space to enable the leadership and administration to relocate from Cornhill Clinic.</li> </ul>
Cornhill Clinic	<ul style="list-style-type: none"> <li>Review the opportunity of greater agile and home working, as well as the use of other potential neighbourhood locations (including, but not exclusively Partington Health Centre) to relocate the team and assist with the disposal of this asset, the proceeds from which will return to the Health and Social Care economy of Greater Manchester.</li> </ul>
Tatton House	<ul style="list-style-type: none"> <li>No recommendation.</li> </ul>
Altrincham Health and Wellbeing Centre	<ul style="list-style-type: none"> <li>Identify opportunities for CCG commissioned teams to relocate to this operational asset, in conjunction with the advent of greater agile and home working, to rationalise space across the Council's administrative estate and reduce the costs to the system.</li> </ul>
All assets	<ul style="list-style-type: none"> <li>Set out a carbon reduction programme for all operational assets.</li> </ul>

#### 4.5. The Effect of the Covid19 Pandemic on Agile Working

Throughout the course of 2020 and into 2021, the pandemic initiated a significant change in the way that the public sector delivered its services; the situation pushed remote working and the digital agenda forward with greater speed. Although a return to using offices and public sector buildings is expected in 2021, there are some elements of the experience, which many residents, public sector workers and their organisations will want to keep. Much learning has been gained from how our residents would like to and can access our services and will influence the digital strategy of our services for the future. This will undoubtedly result in a significant change to the operational requirements of the organisation.

The Council has started, and will continue to reassess the various working styles that make up the delivery of its services. Initial research indicates there is greater agility in the workforce than before the pandemic and suggests that a significant reduction in office space could be achieved. The organisation will continue to explore what changes are necessary to its estate and people policies to best facilitate the new ways of working and productive service delivery.

## 5. Core Strategic Objectives & Management Plan

The role of this strategy is to take the information in the preceding sections and digest it into a clear vision for the future, giving a set of principles from which the leaders, elected members and officers of the Council can work to progress the Council's priorities in this area of work, so as to make the vision reality.

The key principles listed in section 3.2 have been distilled into objectives, each with a rationale and initial ideas as to how they can be delivered, so that we are starting to translate strategy into expected activity.

### Core Strategic Objectives:

- 1) To facilitate improvements in service delivery;
  - a) within the Council
  - b) with our partner organisations.
- 2) To continue to work to, and further embed, the Corporate Landlord approach for the managing of the Council's operational assets - *with a specific focus on: wider engagement, efficient maintenance of assets, management of risks, compliance assurance and reduction of maintenance costs.*
- 3) To minimise the cost of the estate.
- 4) To identify opportunities to release assets that may support other corporate priorities.
- 5) To identify opportunities for income generation.

<b>Objective 1a - Support service delivery (of Council services)</b>	
<b>Rationale</b>	<p>We require the use of a range of properties and facilities in order to deliver our service outcomes - the right property, fit for purpose and in the right location to meet current services and to plan for the future.</p> <p>It is vital that the Property Function understands service needs as the design, location and management of a property asset can impact on a service's ability to operate to their maximum potential. It is therefore essential that we operate effectively with clear policies and processes and ways of working.</p> <p>How our working spaces function should support the EPIC values and four working styles supported by the Council; Agile, Office, Home and Community, acknowledging many teams will be a blend of working styles; each requiring a supportive environment to deliver Council Priorities.</p>
<b>We will achieve this by</b>	<ul style="list-style-type: none"> <li>• Make Trafford Town Hall the centre of the main administrative estate.</li> <li>• Take account of service strategies as well as other programmes; such as Recovery, Digital and Modernisation, to facilitate the provision of fit for purpose working spaces.</li> </ul>

	<ul style="list-style-type: none"> <li>• Understand the volume of office space required so that the administrative estate fits that need, including taking account of the emerging requirements of the Covid19 pandemic and its implications for working spaces.</li> <li>• Work with the Council's facilities management providers to meet the requirements of the services working within the Council's estate.</li> <li>• Developing a culture that embraces and supports a modernised approach to our working styles and spaces.</li> </ul>
<b>Success factors</b>	<ul style="list-style-type: none"> <li>• A demonstrably clear understanding within property services of service needs via short, medium and long term plans for the operational estate.</li> <li>• Engagement of all directorates in the Corporate Landlord forum and user groups.</li> <li>• Communications are clearer and both our Property Team and their stakeholders understand what their roles are and how they deliver their services.</li> </ul>

### Objective 1b - Support service delivery (with partner organisations)

<b>Rationale</b>	<p>The Council works in partnership with host of other organisations, which brings about the sharing of working space either within the Council's estate or within our partner's estate.</p> <p>Working in partnership with public sector, service providers and the Voluntary, Community and Social Enterprise (VCSE) sector is integral to how the Council will deliver on its Vision and Priorities to the residents of Trafford.</p> <p>These organisations currently include but are not limited to:</p> <ul style="list-style-type: none"> <li>• Trafford Local Care Organisation</li> <li>• Trafford CCG</li> <li>• Manchester Foundation Trust</li> <li>• GM Mental Health Trust</li> <li>• CAMHS</li> <li>• GM Fire and Rescue Service</li> <li>• GM Police</li> <li>• GM Growth Hub</li> <li>• Service providers such as Citizens Advice Bureau, Early Break, Cheshire Wirral Partnership, Creative Support and BlueSCI.</li> </ul> <p>A positive and reliable working relationship with our partners provides value for money for Trafford residents.</p> <p>In addition, a change in government policy, which sees the proceeds of the disposal of NHS Property Services Assets reinvested in the health economy of Greater Manchester, will provide much needed capital investment in the area and requires the public sector to have a clear investment strategy to ensure the benefit of any disposals in Trafford are kept within the Trafford economy.</p>
<b>We will achieve this by</b>	<ul style="list-style-type: none"> <li>• Embed the Corporate Landlord model to make it simpler and easier for us to work with our partner organisations and respond to requests for accommodation.</li> </ul>



	<ul style="list-style-type: none"> <li>• Have a clear link into the Trafford Strategic Estate Group, leading to more collaborative projects being delivered on time and to cost.</li> <li>• Work to maximise the use of the Place-Based estate (working spaces / meeting spaces), specifically: <ul style="list-style-type: none"> <li>○ (West) Partington HLC &amp; other Western Area opportunities</li> <li>○ (South) Altrincham HWBC</li> <li>○ (Central) Waterside</li> <li>○ (North) Seymour Grove / Trafford Town Hall</li> </ul> </li> <li>• Work in partnership to support effective service delivery within our partners' estate.</li> <li>• Seek alignment in organisational culture and approach to working styles and spaces.</li> <li>• Ensure that health, safety and wellbeing are considered within all decision making.</li> </ul>
<b>Success factors</b>	<ul style="list-style-type: none"> <li>• We share space with our public sector partners and the voluntary sector.</li> <li>• We work collaboratively with our public sector partners via the Strategic Estates Group.</li> <li>• We work collaboratively with our voluntary partners via Council teams such as Early Help and Partnerships and Communities.</li> <li>• Our public sector partners and the voluntary sector needs are included in our short, medium and long term plans for the operational estate.</li> <li>• Engagement of all organisations accommodated within the estate via the Corporate Landlord User Groups.</li> <li>• Communications are clearer and both our Property Team and their stakeholders understand what their roles are and how they deliver their services.</li> </ul>

<b>Objective 2 - Embed Corporate Landlord</b>	
<b>Rationale</b>	<p>As described in section 3.1 the Council works to a Corporate Landlord model. This model centralises the management, control and responsibility for the Council's property assets and expects to gain operational and financial efficiencies as well as opportunities to support corporate objectives. Working in this way provides a long term view based on evidence and data. It should include all areas of the Council, so it is pulling together to achieve corporate aims.</p> <p>The property portfolio can be managed effectively and the right money spent on the right buildings at the right time by a forward facing Property Function with a clear understanding of what it needs to deliver.</p> <p>Actions need to take into account the findings of the Strategic Review of the Operational Estate (Section 3.4) and result in a fully implemented model.</p>
<b>We will achieve this by</b>	<ul style="list-style-type: none"> <li>• Re-establish the Corporate Landlord model to service managers across the Council to ensure there is clear organisation wide understanding of the estates functions, how this model supports service delivery and how they can engage with it.</li> <li>• Ensure successful delivery of the obligations within the estates and facilities management contracts, with Amey (Lot 3 of the Provision of Environmental and Infrastructure Services contract) and Engie (PFI contract for facilities</li> </ul>

	<p>management at Waterside), to ensure efficient maintenance of the estate and customer service.</p> <ul style="list-style-type: none"> <li>• Build a sustainable portfolio of assets, to improve the condition, utilisation and fitness for purpose of each asset.</li> <li>• Have agreed procedures, policies and ways of working that facilitate the central management of property. For example: <ul style="list-style-type: none"> <li>○ A corporately adopted accommodation request process that ties in with HR recruitment activity and/or the Request for Change process</li> <li>○ A capital funds request process</li> <li>○ A clear disposal process, which is linked to the Strategic Estates Group</li> <li>○ Clear and accessible assessments of the condition of those properties within the operational estate</li> <li>○ A clear and evidence based capital works programme for the short, medium and long term investment in Council property</li> <li>○ A clear process of risk management</li> <li>○ Ensuring all processes are inclusive and receive buy in across all the relevant departments of the Council.</li> </ul> </li> <li>• Require all non-Council occupation of buildings to be formalised by lease or licence, with clarity for all parties about the financial arrangements and obligations between them.</li> <li>• Work with partners to include them in the Council's journey to more efficient use of working spaces.</li> <li>• Create a clear, time bound, accommodation request process that partner organisations and the VCSE sector can link into, to request working or service delivery space.</li> </ul>
<p><b>Success factors</b></p>	<ul style="list-style-type: none"> <li>• The Corporate Property Strategy and Property Asset Management Plan are socialised across the Council, are available to all Council employees and stakeholders and are recognised as the definitive documents to explain what the Estates Team and Facilities Management Teams do and why.</li> <li>• Communications are clearer and both our Estates Team and Facilities Management Teams and their stakeholders understand what their roles are and how they deliver their services.</li> <li>• Engagement of all directorates in the Corporate Landlord forum and user groups.</li> <li>• A demonstrably clear understanding within property services of service needs via short, medium and long term plans for the operational estate.</li> <li>• Decision making on use, occupation and investments in property and land are corporately made based on clear evidence/data that clearly supports the investment decision, with a clear process for initiating property related change projects in place and used Council wide.</li> <li>• We have an accurate baseline of the current performance of our land and property assets that includes revenue, capital, occupation, utilisation and compliance metrics.</li> <li>• We are managing the delivery and monitoring the success of the Corporate Property Strategy via a set of meaningful KPIs.</li> <li>• There is 100% statutory compliance across the estate.</li> <li>• A robust maintenance regime is in place focused on planned maintenance and the reduction of reactive maintenance.</li> </ul>

<b>Objective 3 – Minimise the cost of the estate</b>	
<b>Rationale</b>	<p>An efficient operational estate provides clarity and certainty around operating costs, which contributes to the clear projections required in the management of Council financial resources.</p> <p>By taking advantage of the increasing agility of the workforce, the size of the administrative estate has an opportunity to reduce, thus providing a opportunity to reduce its cost.</p> <p>By working in partnership with other public sector organisations to make the most of key assets, the overall burden of property costs on the public purse should reduce.</p>
<b>We will achieve this by</b>	<ul style="list-style-type: none"> <li>• Work with partners to make the best use of key assets; those with long term public sector, place based or neighbourhood interest. Including, but not exhaustively: <ul style="list-style-type: none"> <li>○ Maintaining Trafford Town Hall as the main administrative base.</li> <li>○ Identifying medium and long term plans for Waterside House to account for the duration of the PFI agreement and the exit from the agreement on the expiry of its terms.</li> <li>○ Continue to have Altrincham Health and Wellbeing Centre as a considered option in all service moves.</li> <li>○ Making the most of Partington Health Centre and Healthy Living Centre as a hub in Partington.</li> </ul> </li> <li>• Work with services to understand the ongoing and changing requirements from the estate.</li> <li>• Work with services and partners to take advantage of digital advances and to achieve good utilisation levels within the operational estate.</li> <li>• Starting a programme to identify energy saving and carbon reduction opportunities across the operational estate.</li> <li>• Identify energy saving opportunities and incentives within the occupation agreements with partner organisations.</li> <li>• Identify a long term solution to the Council’s storage requirements.</li> <li>• Clarify the process and expected timelines around sites recommended for disposal to completion.</li> </ul>
<b>Success factors</b>	<ul style="list-style-type: none"> <li>• The portfolio is managed and maintained within the agreed property budget(s).</li> <li>• We have accurate baseline of revenue spend per property.</li> <li>• Capital and revenue investment in the Council’s land and property assets is continually monitored and challenged to ensure the right money is spent, on the right buildings, at the right time through the Gateway Process.</li> <li>• Using public sector property effectively to reduce private sector rental charges where appropriate and based on an approved business case.</li> <li>• Challenging the cost of property activities to drive improvement in running and operational costs of the estate by minimising energy and water consumption, CO2 emissions and waste and maximising renewable energy solutions.</li> </ul>

	<ul style="list-style-type: none"> <li>The performance of the Council's land and property assets is measured and monitored through an effective sets of KPIs that are owned by the Property Function.</li> </ul>
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#### Objective 4 - Identify opportunities for the release of surplus assets

<b>Rationale</b>	<p>By taking advantage of the opportunities provided by making the most of key assets, working in partnership and new ways of working, it should provide opportunities where surplus Council assets can be released to support Council priorities, such as for the creation of homes.</p> <p>In addition, a change in government policy, which sees the proceeds of the disposal of NHS Property Services Assets reinvested in the health economy of Greater Manchester, will provide much needed capital investment in the area.</p>
<b>We will achieve this by</b>	<ul style="list-style-type: none"> <li>Understand the volume of office space the Council and partners will require for the delivery of services in the future.</li> <li>Using the recommendations of the Strategic Review as a starting point, review the options available for the sites mentioned.</li> <li>Clarify the process and expected timelines around sites recommended for disposal to completion.</li> </ul>
<b>Success factors</b>	<ul style="list-style-type: none"> <li>Actively seeking the best uses for our surplus sites and releasing properties for sale in a timely and co-ordinated way.</li> <li>Selling surplus property at market value, unless it is better suited to achieve Council Priorities.</li> <li>We will have secured sites suitable for housing and employment need.</li> </ul>

#### Objective 5 - Identify income generation opportunities

<b>Rationale</b>	<p>By improved Corporate Landlord processes, specifically the requirement for all non-Council occupation of buildings to be formalised and by improving understanding of the occupation of the Council's operational buildings, opportunities for vacant space to be leased out for other uses can generate income for the Council.</p>
<b>We will achieve this by</b>	<ul style="list-style-type: none"> <li>Understand the volume of office space the Council and its partners will require for the delivery of services in the future.</li> <li>Identify vacant space and consider the options for alternative use.</li> <li>Identify carbon saving technology that could be placed on Council assets that has the potential to generate income in the long term.</li> </ul>
<b>Success factors</b>	<ul style="list-style-type: none"> <li>We will generate additional income from the Council's land and property assets.</li> </ul>

## 6. How we will deliver this strategy

The subsequent Property Action Management Action Plan will set out in detail how we will work to deliver each of the priorities including the governance arrangements, resources, tools, policies and

systems and will underpin strategic decision making at Corporate Landlord level across the Council. The Action Plan will have accompanying status and risk logs and be used as a key documents within the regular Corporate Landlord Operations and Strategic Group meetings.

## **6.1. Next Steps**

### **6.1.1. Action Plans and Risk Management**

A Property Asset Management Action Plan is being developed and refined in preparation for the new financial year in April 2021. It will identify and prioritise the activity needed to deliver our vision and where responsibility for that activity lies. This will be a 'live' document and track the status of the activity within it. The Corporate Landlord Groups will take forward the implementation of this strategy via the updating of the plans named above.

A risk management plan will be developed in parallel and, again, will become a strong feature of the Corporate Landlord processes.

All plans will incorporate an approach that supports the Council's EPIC Values.<sup>iv</sup>

## APPENDICES:

### APPENDIX 1 – Corporate Landlord Groups Terms of Reference

#### Corporate Landlord - Terms of Reference

The Corporate Landlord Function is split to form a strategic group and an operational group. These will link through to all levels of the organisation (and partners where relevant) via all directorates providing representation on the groups and via user groups attended by staff.

#### Strategic Corporate Landlord Group

The Strategic Landlord Group is a corporate group made up of representatives from each directorate within Trafford Council/CCG.

The Group has overall responsibility for :-

4. Developing and implementing a corporate approach to the management of assets across the integrated Council/CCG.
5. Taking a strategic view of the capital programme and asset management and managing the implementation of the agreed asset strategy and asset management plan.
6. Ensuring that asset plans are consistent with the principles of One Public Estate and the Locality Asset Review.

The Strategic Landlord Group will undertake the following activity:

1. To develop the Council's Strategic Land Review Programme and Corporate Landlord capital programme prior to approval by CLT and the Executive
2. To review Council land and buildings in order to ensure that the Council properties are contributing to the main aims/objectives of the Council and are fit for purpose.
3. To identify operational property requirements at an early stage for each service so that a full property review can be carried out in order to inform future decisions.
4. To recommend to the Place Shaping Board strategic acquisitions and disposals which assist key regeneration projects or provide new investment assets for the Council as part of the property review process.
5. To promote value for money and sustainability in all capital expenditure and the whole-life costing implications in respect of assets.
6. To consider the strategic property requirements of other public sector partners in the borough in order to maximise opportunities from property sharing, disposal of surplus properties or joint venture arrangements.
7. Undertake periodic reviews of the Council's Capital Programme (both expenditure and income) and to report variances/issues to CLT/Members as appropriate.

Membership and Management of the Group:

- To comprise of a named representative or appropriate deputy with sufficient seniority to be able to actively contribute to the group:

#### Trafford Council

- Corporate Director for Place
- Corporate Director for Children's Services
- Corporate Director for Adult's Services
- Corporate Director of Strategy and Resources

- Corporate Director of Finance and Systems and/or Head of Financial Management
- Corporate Director for Governance and Community Strategy and/or Head of Customer Services
- Strategic HR Lead – Health, Safety and Wellbeing
- Estates and Facilities Client Manager

Amey

- Account Manager
  - Head of Facilities Management
  - Head of Major Projects
- One of the above representatives will be tasked to sit on the separate User Groups at Trafford Town Hall and Waterside House.
  - Meetings shall be held no less than 4 times per year.
  - The chair shall be Trafford Council's Corporate Director for Place, or a nominated deputy.
  - The meeting will require a minimum of 4 representatives to be quorate which shall require a minimum of one representative from Trafford Council and Amey.
  - The meeting shall be serviced by Trafford Council.

**Operational Corporate Landlord Group**

The Operational Landlord Group is a corporate group made up of representatives from the areas of the Council and Amey which have operational responsibility for managing the Council's facilities.

The Group has overall responsibility for :-

5. Devising and delivering an action plan with regards the Council's operational properties throughout the subsequent 12 months, in line with the strategy devised by the Strategic Corporate Landlord Group.
6. Resolving or escalating any operational issues put forward by the User Groups.
7. Delivering any new strategies put forward by the Corporate Strategic Group, via the use of Task & Finish Groups
8. Ensuring delivery of the Corporate Landlord capital programme on budget and on time.

The Operational Landlord Group will undertake the following activity:

1. Take the lead role on safety and statutory compliance within buildings.
2. Provide central management control over the property revenue budgets, taking account of best value for money.
3. To have overall responsibility for the day to day management of the Councils Operational land and property.
4. Consider options to relocate services to increase efficiency and utilisation of the operational property portfolio.
5. Identify assets which are no longer fit for purpose.
6. To consider and where appropriate introduce new processes, performance monitoring, quality assurance measures and quality standards.
7. Consider escalation of day to day operational issues from the User Groups.

Membership and Management of the Group:

- To comprise of a named representative or appropriate deputy with sufficient seniority to be able to actively contribute to the group:

Trafford Council

- Director of Property
- Strategic Finance Manager Place & Central Service
- Accountant, Capital Budget
- Strategic HR Lead – Health, Safety and Wellbeing
- HR

Amey

- Account Manager and/or Senior Estates Surveyor
- Facilities Management – Operations Manager
- Major Projects Manager

- Meetings shall be held no less than 10 times per year.
- The chair shall be Trafford Council's Director of Property, or a nominated deputy.
- The meeting will require a minimum of 4 representatives to be quorate which shall require a minimum of one representative from Trafford Council and Amey.
- The meeting shall be serviced by the Estates Team within Amey Consulting.

**User Groups**

There will be user groups for the main buildings housing Trafford Council/CCG staff and partners where relevant. At this time there are to be User Groups at:

- Trafford Town Hall
- Sale Waterside

The purpose of each User Group is to:

- Act as two way communication between the Users of the building and the management of the building. 1) The disseminating messages to the users of the building from those managing the building **and** 2) enabling those using the building to escalate any problems for resolution that are not able to be tackled via usual reporting methods.
- Find proposed resolution to issues arising through the cohabitation and sharing of space between different groups of workers and various organisations.
- Act as a filter and escalation route for matters that cannot be tackled at this level and require higher authority and / or budget for a resolution to be found.

Membership and Management of the Group:

- To be inclusive to all those working from the relevant buildings, regardless of their organisation.
- Notify the wider workforce of meetings in advance (**via local notices**)
- Meet on a regular basis, as decided amongst those chairing and attending the group, but no less than quarterly.
- Take notes / action points of the meeting and distribute them to those attending and make them available to the wider workforce (**via the intranet**)

Richard Roe

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<sup>i</sup> <http://www.trafford.gov.uk/about-your-council/strategies-plans-and-policies/docs/Corporate-Plan-2019.pdf>

<sup>ii</sup> <http://www.traffordpartnership.org/locality-working/Docs/Trafford-Together-Locality-Plan.pdf>

<sup>iii</sup> <http://www.trafford.gov.uk/about-your-council/budgets-and-accounts/docs/Executives-Revenue-Budget-Proposals-2020-21-and-MTFS-2021-22-2022-23.pdf>

<sup>iv</sup> **EPIC Values:**

**People focused** - We place people at the centre of the work we do.

**Digitally enabled** - We have technology that supports the ways we want to work.

**Commercially minded** - We are efficient and effective in the ways we use resources, mindful of long term impacts.

**High performing** - We are empowered to make decisions and continuously improve our services.

**Place based** - We make the most of assets in the borough to deliver the best possible local services.

**Excellence** - We deliver excellent customer experience to meet the 21 century expectations of our residents