



Westmorland
& Furness
Council

Strategic Asset Management Strategy 2024-2029



**‘Optimising our approach
to the Council’s assets
to support our vision and
values’**



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Policy



Barrow Town Hall

Introduction

Local Authorities across the UK hold large property portfolios (assets made up of buildings and land) which have been acquired, gifted or inherited over many years.

Westmorland and Furness Council came into being on 1st April 2023, as part of the reorganisation of local government in the county of Cumbria. As a new council Westmorland and Furness has inherited approximately 1,200 land and building assets (not including social housing), from the former authorities (Barrow BC, Eden DC, South Lakeland DC and a sizeable portion of Cumbria CC's portfolio).

Some of these buildings and land will be essential for delivering effective and vital services to our communities and service users in the future. Others are no longer fit for purpose, possibly being in the wrong place, not suitable for modern approaches to working and/or service delivery. Other assets may simply be duplicates due to several organisations forming into one.

To achieve our visions, priorities and values as a council we need to ensure that we use all our resources in the most effective ways possible which especially includes our land and buildings. It is likely to take several years to:

- Fully understand and challenge how our buildings are currently used,
- Plan how they will need to be utilised in the future and where they need to be sited,
- Develop a programme of acquisition, disposal, construction, and partnership to ensure we have the most effective estate moving forward within the resources available.

These documents have been developed at the start of this process. At a high level they set out our initial aspirations for the corporate estate, and how our land and buildings can support the Council's vision. At this early stage they pull out key emerging strategies which will shape the way we plan, manage, and maintain our buildings. Finally, they include an outline list of actions as we embark on this journey.

The documents are therefore set out in three separate elements which come together in an overall Asset Management Framework which comprises:

- An Asset Management Policy
- An Asset Management Working Strategy
- An Asset Management Working Action Plan

The Strategic Asset Management Strategy is a suite of living documents, not all parts will need to be updated at the same time for it to remain fresh. The Asset Management Policy is likely to remain constant for several years. The Strategy is unlikely to change frequently but will have a shorter life than our overall land and property policy objectives.

Supporting these two documents is a Working Action Plan. This is a 'living document' and will be used and adapted to develop our processes, planning and management of our programmes of work on a regular basis to ensure we develop an estate that can support current and future council requirements.

Asset Management Policy

This Asset Management Policy establishes some clear principles by which we will manage our land and buildings. It will remain in place for the next five years but will be reviewed annually to ensure continued relevance to what we are trying to achieve.

Our mission is to provide a land and property portfolio which....

| |
|---|
| 1. Is managed corporately to support the Council's Vision (Great place to live, work, thrive) |
| To adopt a 'Corporate Landlord' approach in order to plan and manage property as a corporate resource |
| 2. Ensures value for money |
| To manage and maintain property effectively and efficiently together with optimising financial return where appropriate |
| 3. Supports our commitment in the drive to become carbon net zero, protect and enhance the natural environment |
| To promote a sustainable environment for people's wellbeing, the economy and the natural environment |
| 4. Provides the right property, fit for purpose, in the right place both now and in the future |
| To regularly challenge our estate to ensure our facilities are in the right place with good design, meeting current need and ready to support future service delivery |
| 5. Supports inclusive and green growth |
| To use land and building to stimulate development and growth together with supporting green and inclusive growth encouraging new business to the area and supporting existing employers |
| 6. Promotes community empowerment and proactive working with partners for the benefit of our area |
| To promote joint working with other public sector organisations, businesses and our communities in support of the councils aims and objectives |

Our vision:

Our vision for Westmorland and Furness is to be:
“A great place to live, work and thrive.”

A great place to live

Local and community leadership enabling a voice for all

Housing for all making best use of previously used land and existing buildings

Empowered places – towns and countryside

Welcoming, proud and resilient communities

A green and biodiverse environment

Opportunities for children and young people to live healthy, happy lives;

Support for those that need it, when they need it

A great place to thrive

Opportunities for jobs, learning, skills and enterprise

A sustainable, inclusive, diverse, economy

A growing work force and high quality jobs

Support to encourage business creation

Improved infrastructure and connectivity

For communities

Opportunities for education, health, and wellbeing

Excellent walking and cycling routes

A great and diverse visitor offer in our towns and countryside

Thriving cultural economy

Support for all to start well, live well and age well

Holistic early intervention to support people in need

Our priorities:

For people

Supporting active, healthy happy lives for young and old.

Supporting people in need and reducing inequality.

For the climate

Providing leadership in the drive to become carbon net zero.

For communities

Confident, empowered, resilient communities.

For the economy and culture

Sustainable, inclusive, economic growth.

For our customers

At the heart of everything we do.

For our workforce

Confident, empowered and inclusive workforce.

Our values

What we want to achieve

At Westmorland and Furness Council, our Values are not just words; they underpin everything we do. They guide us in delivering our vision in the Westmorland and Furness Way.

Being a caring council is the golden thread that will run through everything we do, and our Values will help us achieve this.

We are committed to our Values and want employees and elected members to show their commitment too.

We are a caring council that cares about all employees and elected members and creating a healthy working environment that enables everyone to fulfil their potential.



Ambitious

We are ambitious for everyone. We will focus on identifying and delivering the outcomes that our communities want to see. We will support our workforce to innovatively transform services for the better, enabling residents and visitors to have healthy, happy lives.



Inclusive

We will be an inclusive council and will work collectively with partners to challenge each other to improve diversity and eliminate all forms of discrimination in our organisations and through local leadership increase participation in local decision making within under represented communities.



Outcome focused

We are outcome focused and we will focus on identifying and leading the delivery of the changes that our communities want to see.



Collaborative

We will work with partners, communities, and residents to deliver the best outcomes for all.



Responsible

We are responsible, socially, environmentally, and financially. Providing leadership in the drive to become carbon neutral and delivering value for money in everything we do. We will make the best and most efficient use of our resources, while making sustainable decisions and striving to deliver on our promises to you.



Needs-led

We will intervene early to prevent harm, act in an equitable way leaving no-one behind, and enable all to ask for help in order to gain access to the right service, in the right place at the right time.



Ecologically aware

We will provide leadership in the drive to become carbon net zero and sustainable.

Our Objectives

To support our vision and priorities we have set out six policy objectives on the following pages. These describe the Council's commitment to Strategic Asset Management and to achieving the benefits that can be delivered through effective use of the portfolio.

These objectives are important for decisions made in respect of our property assets.

Actions and Behaviours

In developing these objectives there are certain actions and behaviours that we need to adopt relating to our land and buildings. These are set out under each objective, but not in any particular order of priority. It is also accepted that there will be occasions where some of these elements may appear to be in conflict. The key challenge for the Council is ensuring that we maintain an appropriate balance between all of these elements as decisions around land and buildings are made.

1. To provide a land and property portfolio which is managed corporately to support the Council's Vision (Great place to live, work and thrive).

- As a caring council we will challenge and make decisions on property matters at a corporate level in line with the Council Vision.
- Take account of service demand and priorities and balance these against our overall corporate objectives.
- Manage property budgets centrally to prioritise key investment needs and consider property alongside other resources.
- Ensure property information is accurate, current and comprehensive so that we can make informed choices.
- Integrate property with other resource planning.
- Manage Capital Projects efficiently and effectively and prioritise projects in line with the Council's Vision.

2. To provide a land and property portfolio which ensures value for money.

- Seek to deliver value for money by ensuring that property is suitably managed and maintained within budget constraints.
- Challenge the cost of property activities through effective contract management.
- Challenge our use of assets where appropriate including options for disposal, acquisition, and optimising space for third party demand and income generation.
- Seek efficiencies in occupancy and utilisation and support new ways of working and alternative service delivery models where appropriate.
- Prioritise capital expenditure to support corporate objectives and manage capital projects as efficiently as possible.

3. To provide a land and property portfolio which supports our commitment in the drive to become carbon net zero and protect and enhance the natural environment.

- Review our buildings / asset portfolio as part of an estate decarbonisation programme.
- Ensure property design, construction, operation and maintenance optimise sustainability as far as economically viable.
- Reduce energy use, water consumption and CO2 emissions together and we are committed to sending less waste to landfill.
- Invest in renewable energy to reduce our reliance on fossil fuels.
- Increase our use of renewable energy and undertake energy efficient 'invest to save' opportunities where appropriate.
- Encourage and monitor responsible environmental performance by our suppliers and contractors and work in partnership with key government bodies and other organisations to reach our common goals on climate change.
- Use our estate to support the Council's development of key programmes that support the Council's environmental ambitions, such as a robust network of charging points and biodiversity netgain.

4. To provide a land and property portfolio which provides the right property, fit for purpose, in the right place both now and in the future.

- Regularly review our land and property assets to challenge, optimise and invest in the estate.
- Work with service areas to understand current and longer-term requirements, respond to alternative service delivery models and specifically utilise modern technology to maximise efficiencies and flexibility.
- Work to provide property that is flexible and resilient to respond to future service need, the customer, changes in the economy and social demand.
- Promote a high-quality physical environment, seeking to create and sustain high quality town centres and rural spaces, supporting and promoting independence and wellbeing within our communities.
- Prioritise expenditure to make our buildings suitable and sufficient for service delivery and the way we work, ensuring inclusion, equality and diversity is paramount within all our decisions.
- Adopt a locality-based approach to planning our service delivery and community shaping.
- Ensure our property is secure and safe to use, fulfilling statutory requirements that supports the health and wellbeing of our employees.

5. To provide a land and property portfolio which supports inclusive and green growth.

- Use our assets to stimulate and support regeneration, place-making and inward investment.
- In line with the Council's capital strategy we will utilise investment for income generation and to create local employment and training opportunities.
- Carefully manage our commercial portfolio effectively balancing regeneration needs, job creation and income generation.
- Identify potential sites which could be brought forward for increased housing supply and/or employment development.
- Work with partners to drive the delivery of targeted accommodation necessary across the area such as affordable housing, lifetime homes, assisted living and later life provision.

6. To provide a land and property portfolio which promotes community empowerment and proactive working with partners for the benefit of our area

- Work with other agencies/groups/partners to promote co-location and joint service delivery through locality-based/community hubs.
- Engage with community organisations, third sector bodies, town/parish councils and anchor institutions to optimise the use of assets.
- Work with partners and communities to realise our ambition to improve health and economic inequalities across our areas.
- Support the One Public Estate programme.
- Support Towns Fund (Towns Deal and Future High Streets Fund), Levelling up Fund, UK Prosperity Fund, Borderlands Partnership, Team Barrow and other relevant UK Government investment plans.



Corporate Assets Team

To deliver against the policy objectives it is acknowledged that the correct culture, systems and processes, resources and skills must be adopted and embedded.

In addition to the Council's own 'Behaviours', the Corporate Assets service has identified four key opportunities which will be realised in the short-to-medium term to shape the development of our newly established team and the standard of service offered to our customers.

Harness shared expertise

Build on the wide spectrum of expertise and knowledge of assets inherited from predecessor teams within legacy councils to wholly integrate former 'two tier' working.

One Team, One Service

Develop understanding across service of 'One Team, One Service' ethos and culture. Communicate with one voice – clear and concise and managing expectations.

'Business Partner' approach

Develop strong 'Business Partner' approach to support other council services across all directorates with the provision of timely professional advice, stewardship and recognised excellence in project/programme delivery.

Digital transformation

Embrace opportunity afforded by Local Government Reorganisation for 'digital transformation', utilising Concerto (Integrated Workplace Management System), to streamline service delivery, improve working practices, drive efficiencies and optimise the asset base.

Strategy



Voreda House, Penrith

Asset Management Strategy

This Asset Management Strategy provides an overview of our land and property estate, together with our main priorities for managing and developing those assets over the next five years.

The Strategy will be reviewed annually and amended within five years to ensure our estate fully supports the Council's overarching vision to be:

... 'a great place to live, work and thrive.'

Our estate will contribute to delivering the Council's priorities through the following key objectives set out within our Asset Management Policy:

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Our Land and Buildings

The council's property portfolio extends to over 1,200 separately listed land and building assets, with a current total book value of over £390 million (as at 1st April 2023).

This is the amount that is included within the authority's accounts and, whilst this is not necessarily the exact amount that we would receive if we sold all of our assets, demonstrates what a considerable resource our land and buildings are, and why they need to be carefully managed.

Without careful management, there is potential to waste money by keeping buildings that are not fit for use or unnecessary. Equally, all assets have a value and if they are no longer required we might be able to reuse them to meet wider priorities, sell them to unlock that value and use, or invest the money elsewhere. The Council's disposal policy determines the stages and approach to decision making on asset disposal.

As the way we deliver services evolves, our assets will also need to change to support the Council as it moves forward. We may need to invest in new assets to ensure we provide services fit for the future and to maximise benefit to the people of Westmorland and Furness.

In support of maximising value for money, in relation to the maintenance and day-to-day running of our buildings, contributory processes are embedded within our Corporate Landlord function. These processes ensure that capital works are prioritised appropriately, based on evidence from building condition surveys, and in alignment with operational priorities of those services in occupation.

Additionally, the Asset Challenge process ensures that the future of those buildings not providing best value are reviewed appropriately before investment decisions are made on them. The governance structure provides further assurance that money is spent in the right places and on the right buildings.

There are a wide range of assets within our current portfolio. It includes offices, residential homes, schools, day centres, car parks, depots, assets leased to community organisations and some assets used to generate an income. The reasons for holding these assets will vary and, as a result, we may need to measure their performance in different ways. Performance of each asset must therefore be linked to the strategic purpose for holding it. The tables on the following pages provide an overview of our portfolio and its contribution to the sustainability of the Council.

Assets deliver a mixture of front-line services, indirect service provision, and support to local communities. We do not just own assets for the sake of it, they need to have a purpose and we constantly need to be challenging this.

Some assets are legacies from donations, local government reorganisations or previous acquisitions. Our Asset Challenge process means that we are reviewing each asset on a rolling programme to ensure we only keep the buildings we need in the future. This process explores the utilisation of assets, along with analysis of running and maintenance costs, and geographical location.

The outcome of this process will identify asset optimisation and investment opportunities to be reflected in our Medium Term Financial Plan.

Our Funding

Like many other councils, Westmorland and Furness faces a challenging financial position and as part of its approach to financial sustainability we need to make careful choices in how we prioritise the money we spend.

This is especially true in relation to property, with a property related gross revenue budget of £14.211m (2024/25), and we need to ensure that every pound we spend is done so in the right way. In addition, there is a capital budget of £10.351m (2024/25) for Corporate and Schools buildings maintenance.

The Council has significant challenges in relation to the buildings it has inherited from the former four councils relating to the age, condition, location, and suitability of its portfolio. There is a current estimated backlog maintenance need of circa £50m over the period 2024/25 to 2028/29 and some of our buildings are clearly no longer fit for purpose.

Despite these challenges, the Council is committed to supporting sustainable, inclusive economic and housing growth which will be essential to deliver high quality jobs. New building development plays an important part in our drive to support the delivery of services which underpin our quality of life, as well as us helping to retain our young people, investment and skilled people. We will support new business creation and actively support the cultural economy to thrive.

Capital Programme

Every pound invested by the authority generates a local economic benefit well in excess of this initial investment. Our Capital Programme will see approximately £412m invested in Westmorland and Furness for the period 2024/25 to 2028/29 - see spend profile below.



The £412m figure is shown in Appendix 1 to the Medium Term Financial Plan on pages 51 to 58.
Appendix 1 - Medium Term Financial Plan 2024-2029 Final.pdf (moderngov.co.uk)

Reactive, Statutory and Planned Maintenance/ Servicing (Hard Facilities Management)

To ensure that the asset portfolio is compliant with statutory requirements, regular inspection and review of property is completed. The reason for this is that the Council has a duty to manage the risk and assess the impact of statutory regulations on its assets in relation to Asbestos, Accessibility, Fixed Wiring and Legionella, as well as Fire Regulation compliance and other health and safety requirements.

The Building Compliance Team with responsibility for hard facilities management deals with 10,000+ individual items annually and is currently taking steps to set up single Measured Term Contract (MTC) for statutory, reactive and planned maintenance of all operational corporate assets. This MTC will ensure ongoing delivery of substantial and specialist maintenance activity, statutory compliance, continued innovation in asset management and value for money.

The Measured Term Contract provides for a lead contractor with significant support from local contractors, delivering complex and niche service requirements across the Council's portfolio.

Minor maintenance works will be excluded from the MTC and delivered through a Directly Employed Technical Team. This approach will be delivered within existing budgets and will improve maintenance response times and customer experience in respect of this genre of maintenance works.

Facilities Management

The Corporate Landlord Service (Soft Facilities Management), undertakes the functions of capital and revenue monitoring, utilities management, grounds maintenance, confidential waste disposal and wider building based support. This part of the Corporate Assets Team also provide a comprehensive building based management service in our main Corporate Buildings.

The Corporate Landlord Service work collaboratively with the Building Compliance Team to deliver a wider support service to allow effective building management throughout our estate. Both teams act as a first point of contact and resolution for all our buildings, offering direct support and guidance.

The Property Budget ensures that council property continues to be fit for purpose and meets current and future service needs. It is vital that council assets are working hard and contribute to overall corporate and service objectives.

The management of the Property Budget is an ongoing activity for optimisation, statutory maintenance and planned maintenance enhancement projects. Any improvements/ enhancements will be expected to extend the usable life of the asset and/or increase the extent to which the asset can be used.

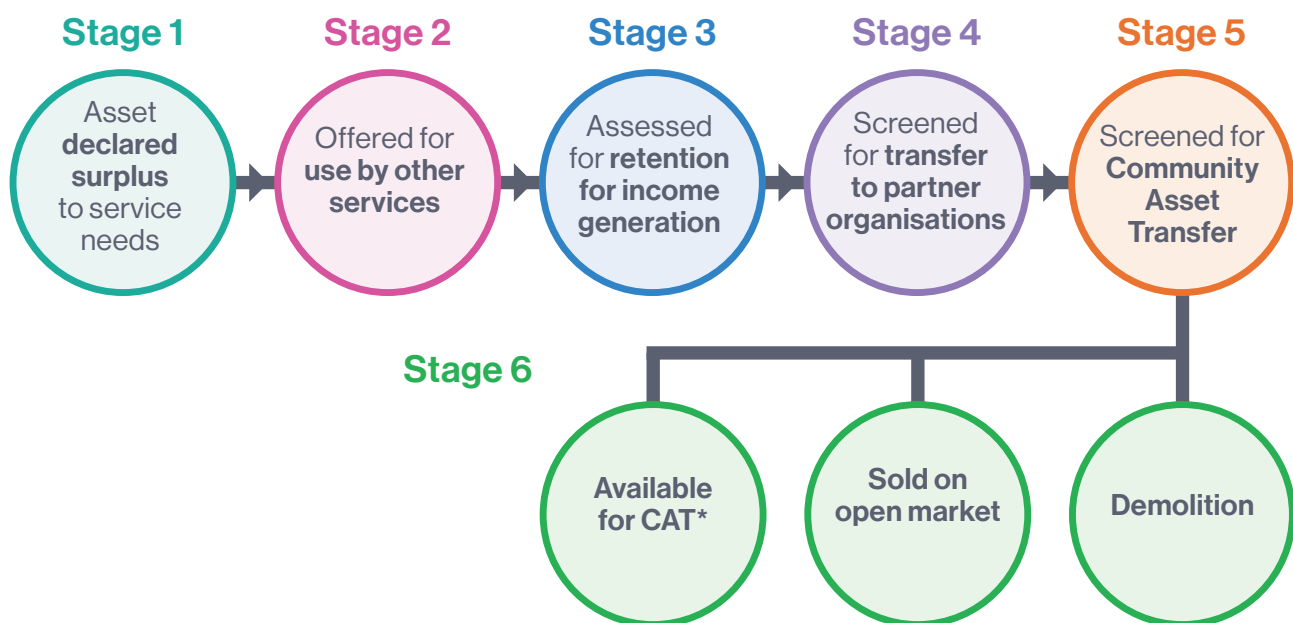
Estates and Investment

A key initial focus in this area is the import of all relevant asset information from the legacy council systems into Concerto (Integrated Workplace Management System). Following a quality control review of imported information, an accelerated programme of lease renewals and rent reviews will be progressed to maximise the income to the Council from the commercial portfolio.

The Council's Property Disposal Policy was adopted by Cabinet in September 2023. When the Council declares a property asset as 'surplus to operational requirements,' the assessment process (shown overleaf) will be followed. This assessment process will pass sequentially through each stage. If stages 2 and 3 do not flag up a council requirement to retain the asset then the stage 4 and then stage 5 screening processes will take place for potential transfer to partner and community organisations. Ultimately the Council may resolve to dispose of an asset on the open market to generate a capital receipt to be invested directly back into council services. The asset rationalisation process is likely to result in the release further surplus assets.

The legacy council estates teams were effective in releasing much needed capital to support investment with approximately £40m of capital receipts achieved in the period 2011 to 2020. This was delivered through the disposal of surplus assets that no longer met service need or contributed to the future running of the estate. The level of capital receipts achieved in the past is unlikely to be sustained and consequently the amount of capital receipts generated from sales will reflect the disposal policy and decisions on which assets are released for sale and when. Allied to this observation is the specific focus of Westmorland and Furness Council to maximise opportunities to repurpose its surplus assets to achieve council priorities through asset transfer to partner organisations and community empowerment.

Asset assessment process prior to sale



*See separate Community Asset Transfer Policy

Sustainable and Inclusive Green Growth

The Corporate Assets Team is well placed to support the Council's aspirations for sustainable and inclusive green growth. As per the Council's capital strategy the Council will be enterprising and innovative where business cases are proven in order to find new ways to generate income to support priority services and exploring new ways of doing things. We will invest wisely in our land and buildings and take advantage of revenue generating opportunities where appropriate.

We will play a role in driving sustainable economic growth and increasing housing supply to help secure the future funding of public services through our role as an employer, a commissioner of services, and a provider of services.

Our activity will not be limited to our own buildings and land but will embrace opportunities within Westmorland and Furness that are supported by prudent and risk aware investment decisions.



Site of Marina Village, Barrow

Capital Programme

The 2024- 2029 capital programme for Westmorland and Furness Council is a combination of the aggregation of the capital programmes of the existing three sovereign District Councils, the disaggregation of the County Council programme and additional schemes that have been approved in 2023/24 by Westmorland and Furness Council. Following a significant amount of due diligence and quality assurance work, the updated Capital Programme approved by Council in February 2024 and the emerging Capital Strategy supports investment to meet the Council Plan priorities.

The capital programme is fully funded and the effect of the cost of investment on the Council's revenue budget is built into the Medium-Term Financial Plan.

In its first year Westmorland and Furness Council is scheduled to deliver more than £65m of investment over the period 2023/24 which is the first part of a six year £500m Capital Programme. The programme will deliver a high volume of projects, with a range of complexity to meet the needs of a diverse group of internal clients, internal and external stakeholders, annual maintenance programmes and one-off programmes.

The type and scale of projects will be shaped by the Council bringing forward a number of key transformation programmes, playing a key role in place shaping and balancing the day-to-day requirements associated with ongoing maintenance requirements.

The Capital Programme is developed in three parts – Maintaining and improving existing assets and statutory compliance; Enabling Council Plan outcomes (including Major Projects); Investing to generate savings and income.

Asset Maintenance and Improvement: During the Asset Management Strategy period a structured plan to address annual and backlog maintenance will be developed across our assets (including Highways). The level of investment will be determined in the context of lifecycle, the process will start by developing intelligence and a new baseline.

The Asset Challenge process will identify assets that should be retained for use, invested in, or repurposed. This will lead to emerging capital schemes for the modernisation and transformation of our assets in the context of continuous improvements to service delivery.

Major Projects: The Council has seen considerable success leveraging major projects and programmes through significant funding schemes from central government including:

1. Town Deals Funding
2. Levelling Up Fund
3. Active Travel Funding
4. UK Shared Prosperity Fund (UK-SPF)
5. Network North Highways Funding
6. Local Electric Vehicle Infrastructure (LEVI) Funding
7. Additional Pothole Action funding

The Council will play key roles directly and indirectly as a strategic authority in scheme development and delivery which will require clear governance arrangements, contract management and risk management appropriate to projects/programmes of this scale.

Investing to generate savings and income: The Council has approved a number of capital schemes that ensure the investment is either self-financing or provides an income stream for the Council in the medium term, for example solar farms.

The Council's limited resources will need to be prioritised to ensure optimal outcomes.

Greystoke School



Table 1: Operational and Non-Operational Corporate Assets

| Operational | | Non-Operational | |
|---|------------|---|------------|
| Adult Social Care (Day centres) | 10 | Arts and cultural venues | 2 |
| Adult Social Care (Residential homes) | 10 | Business centres | 4 |
| Adult Social Care (Storage facilities) | 7 | Bus stations | 1 |
| Arts and cultural venues | 2 | Caravan sites | 2 |
| Car Parks ¹ | 85 | Employment Land | 2 |
| Cemeteries | 14 | Garage Sites (Non-Housing) | 8 |
| Children's Services (Children's & family centres) | 16 | Ground leases | 15 |
| Children's Services (Children's homes) | 3 | Heritage assets | 22 |
| Children's Services (Family group homes) | 7 | Industrial units | 64 |
| Children's Services (Respite care facilities) | 3 | Land - Agricultural and Grazing (leased out) | 23 |
| Community centres and hubs | 11 | Land - Allotment sites (leased out) | 28 |
| Crematoria | 1 | Land - Public open space & amenity space ³ | 294 |
| Depots | 16 | Land - Sports & Leisure ⁴ | 40 |
| Hostels | 2 | Land assembly | 15 |
| Household waste recycling centres (HWRC) | 8 | Miscellaneous structures ⁸ | 40 |
| Houses (Non-HRA) | 64 | Offices (Non-operational) | 16 |
| Hydrotherapy pools | 1 | Public conveniences (Non-operational) ¹⁰ | 32 |
| Kennels | 1 | Reservoirs | 1 |
| Lakes ² | 1 | Retail units | 36 |
| Leisure centres ⁵ | 8 | School (Land - Academy Sites) ¹² | 38 |
| Libraries ⁶ | 19 | Sheltered housing scheme (leased out) | 1 |
| Markets ⁷ | 9 | Substation sites | 6 |
| Museums | 2 | Surplus - Building | 7 |
| Offices (Operational) ⁹ | 10 | Surplus - Land | 19 |
| Public conveniences (Operational) ¹¹ | 12 | Telecommunications sites | 3 |
| Public parks and playgrounds | 100 | Tourist information centres | 2 |
| Rehabilitation centres | 1 | Total | 721 |
| Schools (Maintained) ¹³ | 69 | | |
| Total | 492 | | |

Corporate Assets (Non School) 423

Total number of building assets 560

¹Car Parks - includes three multi-storey oar parks.

²Lakes - includes the bed of Windermere (the largest lake in England). Significant asset (14.95km²) that brings in £1m+ of income per annum: 400+ encroachment lettings hang off this asset.

³Land - Public open space and amenity space - includes a vast array of public open space, nature reserves, community woodland, informal amenity space, grass verges and public realm land.

⁴Land - Sports and Liesure - includes a mix of football and rugby pitches, the sites of golf, bowling and tennis clubs and fishing rights.

⁵Leisure Centres - includes 3G outdoor football facilities in Barrow and Penrith.

⁶Libraries - includes archives in Barrow and Kendal.

⁷Markets - includes market halls in Barrow, Ulverston and Kendal and six street markets.

⁸Miscellaneous structures - includes sea defences, bridges, bandstands, shelters, public jetties and a flood relief dam.

⁹Offices (Operational) - includes three town halls and one county hall

¹⁰Public conveniences (Non-operational) - leased and operated by parish councils/local groups in former district council area of South Lakeland.

¹¹Public conveniences (Operational) - currently operated directly in former district council areas of Barrow and Eden.

¹²Schools (Land - Academy sites) - subject to 125 leases with the council retaining the freehold interest.

¹³Schools (Maintained) - includes 2 special schools, 1 pupil referral unit and 66 schools (5 ancillary school houses not included in total).

Separate to the above, the Council also owns circa 2,500 Council Houses and associated Housing Infrastructure, including garage colonies (504 garages). Housing assets are managed by the Housing Team within the Council's Thriving Communities Directorate.

Inclusive and Green Growth

The Council recognises the importance of economic development in helping to improve the economic wellbeing and quality of life of our communities by building local wealth, diversifying the economy, creating and retaining jobs, and building the local tax base

The Council plays a leading role working alongside local public and private sector partners to create the conditions to encourage private sector investment and create inclusive, sustainable growth.

A number of notable initiatives are set to deliver significant benefits over the life of this strategy and deliver place investment including:

Borderlands Inclusive Growth Deal - A total of up to £350 million will be invested from UK and Scottish Governments in the Borderlands region.

The funding will provide the opportunity to develop key priority projects and programmes that are identified within the Deal package.

- **Energy** - the 'Deal' provides opportunity for the Council to bring forward energy projects within this programme in line with its emerging policy.
- **Digital** - A key element to the 'Deal' is to improve digital and mobile connectivity and the Council will explore the role of its assets in improving digital and mobile connectivity in one of the most rural counties in the UK.
- **Place** - Recognising the importance of our towns, the 'Deal' includes a programme for investment in market towns. In Westmorland and Furness, Dalton, Ulverston and Penrith have been selected for inclusion in the programme.

Destination - the visitor economy helps underpin our wider rural economy and therefore the 'Deal' includes funding to support this sector. Capitalising on our World Heritage Status, investment in our area will focus on attracting visitors to explore the area by sustainable and active travel.



Town Hall and South Lakeland House, Kendal

UK Shared Prosperity Fund and Rural England Prosperity Fund

The Council is responsible for the delivery of £7m to invest in local community and business priorities. This will enable vital investment into:

- Improvements to town centres and high streets
- Arts, cultural and creative activities
- Active Travel
- Impactful voluntary and social action projects
- Improvements to sports facilities
- Business start-up, growth and innovation
- Business decarbonisation
- Support to access employment
- Support to help people in employment access education and training
- Small scale investment in micro and small enterprises in rural areas
- Growing the local social economy and supporting innovation
- Improvements to cultural, historic and heritage institutions and assets

Levelling Up Fund

Three projects in Westmorland and Furness have been identified for funding through the Government's Levelling Up Fund. This will see £37m of investment made into the regeneration of Barrow and Kendal town centres, as well as the creation of a new purpose-built Rural Enterprise Hub in Eden.

Town Deal Funding

Barrow has been successful in receiving £25m of funding from the Government's £3.6bn Towns Fund. The Council is leading the work to deliver seven transformative projects under the Brilliant Barrow programme to ensure Barrow thrives as a great place to live, work and visit for generations to come.

Team Barrow

Barrow-in-Furness will see unprecedented investment in the coming years as it continues to play a critical role in UK's the national defence and energy requirements. There are anticipated to be around 6,000 new skilled jobs coming to the area, with £5m Government funding provided to set up a Team Barrow delivery board and to develop plans to transform the town and meet the national endeavour. Team Barrow will be a collaboration to masterplan for the town and work together on the important workstreams of Transport, Economy and Place, Skills, Community and Social Impact and Public Health. More than £20m of additional public investment is going into the strategic housing allocation of Marina Village to prepare the site for the development of 800 new homes, to help house the future workforce.

In March 2024, the Prime minister announced the creation of a Barrow Transformation Fund, with an immediate £20 million commitment and a further minimum of £20 million a year over the next ten years to make Barrow an even more attractive place to live, work, and build a nuclear career. Initial projects planned for 2024/25 are:

- A £5m Social Impact Fund to provide grants to local organisations and charities, putting Barrow's thriving community sector on a surer footing;
- A £5m Barrow Work and Health fund, to help tackle economic inactivity and improve health outcomes;
- £23.31m for the Council to deliver the A595 Grizebeck Bypass scheme.



A595 Grizebeck

Corporate Landlord

The way we manage our assets is important. We will apply well recognised best practice with the public sector via the Corporate Landlord Model need to ensure that our land and buildings are managed as corporate resources, the right stakeholders are involved, and decisions are made in the context of the council's priorities and objectives.

The concept of a Corporate Landlord Approach is that the ownership of an asset and the responsibility for its management and maintenance is transferred from service areas into the corporate centre. The service area then becomes a corporate tenant and their priority is to plan and deliver their service to the best of their ability. The Corporate Landlord's function is to ensure all services are adequately accommodated and to maintain and manage the associated land and property assets.

Early in the life of the strategy Corporate Landlord function will be applied to all the Council's corporate assets. This function will incorporate full responsibility for asset planning, review, feasibility and working with service areas on options appraisal and accounting for the needs of all service areas, but most importantly, making decisions based on overall corporate priorities.

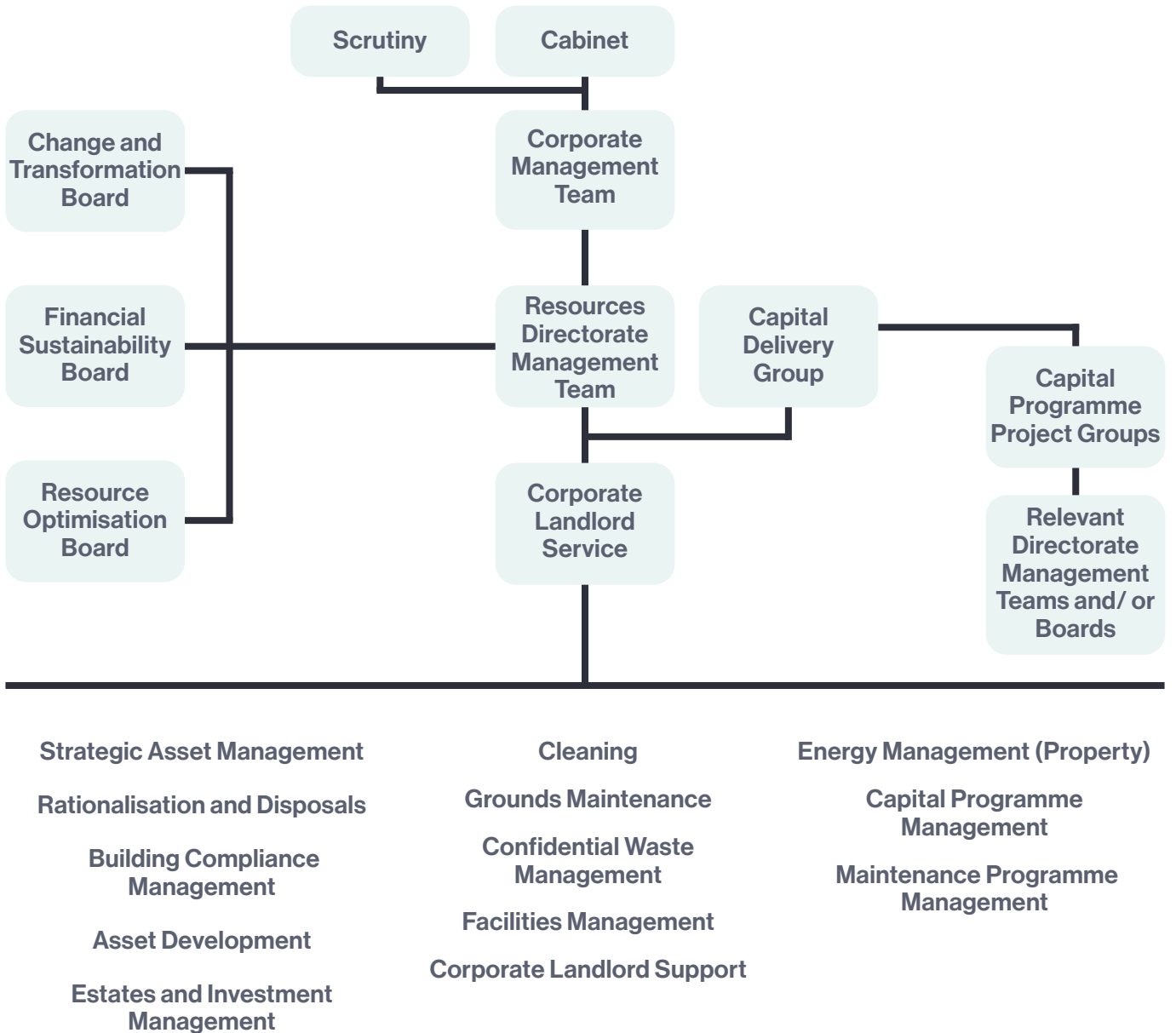
The Corporate Landlord is/will be responsible for the following activities:

- **Capital Programme** - Client, Contract and Project Management. Building Compliance - Reactive, Statutory and Planned Preventative Maintenance.
- **Energy/De-carbonisation** - property only.
- **Facilities Management** (in relation to cleaning, catering, security, caretaking and other asset-based activities) - within a limited number of our buildings.
- **Estates and Investment Management Service.**
- **Strategic Asset Management Planning.**
- **Management of the Council's Investment Property.** Asset Development (including off-street car parks).

There is a robust governance structure in place providing direction and transparency of the management of the council's estate.

The diagram below outlines the organisational structure for the governance of corporate land and building assets.

Diagram 1: Organisational structure for governance of corporate assets



Measuring Our Performance

To manage our assets effectively and efficiently we need to know how they are performing. To do this we use a selection of Performance Dashboards, covering performance in utilisation, cost and income.

Our ability to develop greater intelligence relating to our land and buildings will be enhanced over the life of the strategy with the collection and migration of all asset data onto a Concerto (a Computer Aided Facilities Management (CAFM) System). This system represents a significant shift in how the legacy councils managed and reported on asset performance. They will; play a key role in moving the service into greater utilisation of AI Technology (Artificial Intelligence).

The information gathered from the CAFM system will allow greater granularity and understanding of performance, allowing evidence based decision making regarding the management of the estate. The data gathered will include the provision of floor plans for all operational assets, with each room given a unique reference number. All mechanical and electrical equipment will be given QR codes and maintenance operatives and engineers will utilise hand-held devices to provide real-time updates on work undertaken to each item of equipment. New capital schemes will also provide for the remote monitoring and control of heating systems.

Regular reporting will be adopted through Resources Directorate Management Team meetings, and Corporate Management Team.

The performance of each asset will feed into the Asset Challenge process.

Asset Challenge

Asset Challenge is an embedded process, which means that we will be reviewing all of our asset portfolio on a continuous rolling programme. This ensures that only those assets that are needed are retained. The ultimate aims of Asset Challenge are to reduce costs, identify assets that should be retained for use and/or invested in, identify those that are surplus to requirements and therefore can be re-purposed by the Council, our partners/communities or disposed of.

To do this, each asset is assessed using a step-by-step challenge process, ensuring that every asset has been fundamentally tested against a common set of criteria. Our outline challenge process is set out opposite. A RAG (Red, Amber, Green) rating approach to asset challenge will then be applied, as set out below.

Diagram 2: Initial ‘Outline Asset Challenge’ process

| Strategic Purpose | Opportunities and Risks | Performance Appraisal | Option Appraisal | Pre-Implementation Consultation | Outcome |
|--|---|--|--|------------------------------------|--|
| Why do we have the asset? | Are there any opportunities that could be exploited? | What financial and non-financial outcomes have been delivered? | Balance of performance, opportunities and risks. | Internal Stakeholders | Retained |
| What is its strategic purpose? | Are there any known barriers to exploiting these opportunities? | Can non-financial benefits be quantified, or are they qualitative? | What options are available? | External Stakeholders and Partners | Replaced / Remodelled / Reused |
| Who is accountable for performance of it? | Are there any risks that could be faced? | What are the management costs? | What are the relative costs and benefits of these options? | | Disposed (Open Market or Asset Transfer) |
| What do we expect of it? | What is the customer expectation? | Are there any invisible costs? | Do any options carry increased risks. | | |
| Is this financial, non-financial or both? | | | | | |
| How would we know when this is being achieved? | | | | | |
| Have we considered the customer? | | | | | |



Diagram 3: RAG rating approach to ‘Asset Challenge’

| | Front line service usage - with public access | Suitability access / location in line with Corporate plans | Suitability access - Ways of Working | Utilisation | Sensitivity - Civic importance |
|---|---|---|--|------------------------|---|
| Red = Strong evidence for disposal / repurposing | Not used for front line services / public | Not in right location / not accessible | Does not suit ways or working | Poor utilisation | No sensitivity to a disposal |
| Amber = Some evidence for disposal / repurposing | Some front line / public use | Some issues with location / not accessibility | Reasonable for ways of working | Reasonable utilisation | Some sensitivity but not a major issue |
| Green = Retain (potentially with some investment) | Used by front line / public use | In right location / good accessibility in line with Corporate plans | Good / best practice for current ways of working | Good utilisation | Potential challenge if looked to dispose of |

| | Tenure / Value - Commercial model | Condition - Annual running costs | Condition - Capital Programme costs | Sustainability - Ability to achieve Net Zero | Overall |
|---|--|------------------------------------|--|--|---|
| Red = Strong evidence for disposal / repurposing | No reason what cannot be disposed of also high value | High annual running costs | Major capital investment required to improve condition | Unlikely to achieve Net Zero | Red = Strong evidence for disposal / repurposing |
| Amber = Some evidence for disposal / repurposing | Some minor reasons why cannot dispose of | Moderate annual running costs | Some capital investment required | Signifiicant work required to achieve Net Zero | Amber = Some evidence for disposal / repurposing |
| Green = Retain (potentially with some investment) | Significant reason why cannot dispose of | Low / average annual running costs | Good condition | Limited work required to achieve Net Zero | Green = Retain (potentially with some investment) |

Our Ways of Working

Our Ways of Working (OWOW) is our forward-looking programme, forming part of Westmorland and Furness Council's overarching change programme.

This programme will facilitate the creation of the council we all want, built on our values and behaviours. It will set out how we will work as a council to support the Council's culture, aims and ambitions. It follows a 'needs led' approach with principles underpinning a flexible, modern, agile work style for staff, which also puts the customer and our communities at the heart of everything we do across multiple themes and desired outcomes. These can be broken down into the four pillars which need to work together to give scheme strength, impact and stability. All have relevance to asset management strategy.

 **Workforce Wellbeing**

 **Workplaces**

 **Customer Experience and Community Focus**

 **Culture and Values**

The COVID 19 pandemic accelerated the implementation of programmes across local government to challenge historic working cultures of office-based working, physical meetings and fixed desks for each member of staff. During the pandemic, when there was no other option, thousands of employees went through a rapid transition to home working for a sustained period. OWOW represents a conscious shift to realigning roles to a new 'needs led' approach with principles underpinning a flexible, modern, agile way of working for staff, which also puts the customer and our communities at the heart of everything we do. We want to provide safe, welcoming and modern workplaces, to support our staff and give them the best opportunities to deliver their role.

Asset-related considerations that will flow out of the OWOW programme include:

- Operating more efficiently within the buildings that we need and closing and repurposing the buildings that we do not need;
- Working more flexibly within our buildings and homes, through promotion of agile working, and providing modern fit-for-purpose workplaces;
- Addressing the essential maintenance needs of our remaining buildings, including maintaining mechanical and electrical systems to and prolonging their operational lifespan;
- Reducing our environmental impact - improving energy efficiency and decarbonisation initiatives in our buildings, reducing the prevalence of physical meetings and reducing running costs;
- Serving our customers more efficiently - focusing on what our customers want and need, using better accessible and inclusive facilities to serve them.

Maintaining the Estate

Corporate Estate (Non Schools): Corporate Maintenance Fund

Westmorland and Furness Council is responsible for the maintenance of approximately 425 corporate assets (Non-school) that deliver and or host the Council's operational services.

It is vitally important that these assets are maintained to ensure a safe and appropriate environment to deliver services, support the customer/service users and the workforce. The Council has a programme to carry out condition surveys for all existing property to gain a full understanding of the portfolio. Once this is achieved, 20% of the corporate portfolio will be surveyed each year. These condition surveys help build a better understanding of items of repair and help the council identify and prioritise its resources. The funding for the programme over the next three years is £6.039m 2024/25, £5.946m 2025/26 and £5.946m in 2026/27. We maintain the corporate estate at a level of 'safe, wind and watertight', this does not always address fundamental underlying challenges and consequently may result in emergency closures to deal with repairs.

With increasing revenue pressures across the Council and significant alternative calls on the available capital financing required to drive service transformation, achieve revenue savings and to respond to other areas of need it is becoming increasingly difficult for the Council to provide the additional funding required to keep our corporate estate safe, wind and watertight. This financial pressure creates the very real prospect of buildings having to close or close elements due to the lack of capital maintenance. It is essential that a balanced approach to Asset Challenge is undertaken to ensure we invest in those assets we need and devise a strategy to repurpose or dispose of those we no longer require.



Schools Estate: Schools Prioritised Capital Maintenance Fund

Westmorland and Furness Council is responsible for the direct maintenance of a total of 68 schools which consist of 49 primary schools, seven infant and nursery schools, six secondary schools, three junior schools, two Special Needs schools and one PRU. The total number of schools in Westmorland and Furness is currently 147 (excluding independent, special and alternative schools and further education colleges).

Each local authority maintained school receives funding as part of their core budget which is intended to contribute to capital maintenance activity. The requirement placed on each school is for them to directly fund small scale maintenance and capital improvement activities up to an agreed deminimus level. For primary schools the deminimus level is works up to a value of £10,000 and for secondary schools the deminimus level is works up to a value of £27,000. Above these levels the responsibility for any works falls to the Council. It is important that schools retain the flexibility to respond to small scale capital investment requirements and take the responsibility for so doing.

On an annual basis the Council receives a School Condition Allocation (SCA) from the Department for Education (DfE), which is referred to in the capital programme as school's prioritised capital maintenance (PCM). Over the past number of years this SCA allocation has reduced year on year from £6.711m in 2014/15 to £4.883 in 2019/20 and to £2.437m in 2024/25.

There is a projected requirement of c.£4.31m per annum to address the necessary maintenance activity to keep our schools maintained to a baseline acceptable standard of safe, wind and water-tight.

The budget availability from the SCA therefore represents a significant shortfall. The council has allocated £8.9m of its own resources to the programme to address the shortfall up to 2029. The Council's own resources have been funded through prudential borrowing and have been essential to ensure that our schools remain open and safely operational across this period.

Approximately 20% of the school portfolio is surveyed annually. These condition surveys help build a better understanding of items of repair and help the Council identify and prioritise its resources. The funding for the programme over the next three years is £4.312m 2024/25, £4.312m 2025/26 and £4.312m in 2026/27.

Our overall strategy is to ensure that our finite and reducing maintenance resources are prioritised to appropriate buildings, where the money is needed most. We identify these priorities by conducting a rolling programme of condition surveys which aims to understand lifecycle maintenance requirements over a period of 30 years. This enables a better informed decision-making approach and maximization of efficiencies by planning over a longer time horizon, instead of reacting to emergencies as they happen.

Moving forward, our four key aims for both Corporate and Schools Building Maintenance are:

- To ensure our Buildings are safe and secure for the people who use them.
- To allocate funding to projects that will achieve the maximum positive impact for our customers and communities.
- To achieve an efficient balance between planned and reactive maintenance work.
- Achieving maximum efficiencies in the way we procure building maintenance

Working with Partners

We are active members of the One Public Estate programme (OPE), working closely with other public sector organisations across the Council's area to explore opportunities to reduce premises costs and make assets work better for our communities and customers.

The 'Cumbrian Partnership' seeks to deliver against strategic objectives, primarily the following:

- Create economic growth (new homes and jobs).
- Deliver more integrated, customer-focussed services.
- Generate efficiencies through capital receipts and reduced running costs.

The lead partners are the Westmorland & Furness and Cumberland Councils, the two National Parks, the NHS trusts, Blue Light Services and Central Government Departments.

We are also working with a wide range of anchor employers and key stakeholders, exploring opportunities for shared services and how our assets may be able to support this.

There are many more opportunities across the Council area to explore asset based arrangements including shared buildings and community/ public service points.

The strategic objectives of the One Public Estate programme will seek to:

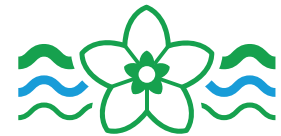
- **Provide improved joined-up and customer-focussed services** - enabling greater collaborative working across public service providers to support individuals, families and communities.
- **Provide improved access to public services** - reducing demand and avoidable customer contacts.
- **Deliver public service efficiency savings** - through greater service integration and new delivery models, supporting service demand- management approaches.
- **Deliver greater savings in running and maintenance costs** - through sharing public service buildings.
- **Work closely with community organisations** - optimising the use of assets where most benefit can be realised.
- **Contribute to wider economic, social and environmental outcomes for the area** - for example, creating new jobs, delivering key infrastructure improvements and cutting carbon emissions.
- **Create standard practices for performance measurement** - reviewing the metrics for building occupancy and space utilisation, void properties and rent levels across the public estate.

An OPE Programme Board, with representatives from all Public Sector Partners, has been established. This Board has its own Terms of Reference and governance to establish how partners will jointly rationalise and dispose of assets, through identification of gaps in services across the area. All decisions are subject to each individual organisations respective governance arrangements.

Finally, we are engaging with our Health Colleagues through a number of forums across the area. These are strategic forums with executive representation from all organisations across Health and Social Care in Cumbria.



Department for Levelling Up,
Housing & Communities



Cumberland
Council



Department
for Transport



Homes
England



Cabinet Office



Empowering our Communities

Community Power

The council has a priority commitment to enable 'confident, empowered and resilient communities.' This will be progressed achieved through the 'community power' strategy. This builds on the principle that communities contain a wealth of knowledge and assets, which if understood and nurtured by policymakers, has the potential to strengthen resilience and enable prevention-focused public services. Strong, vibrant and resilient communities have greater social connectedness, proven to support better health outcomes. This counteracts rising demand on public services leading to greater prevention and early intervention practice and ultimately the avoidance of costs. The council will support and enable communities to grow at their own pace; trust that communities have the knowledge, skills and assets to identify and respond to challenges; Pass more resources and decision making to communities; and collaborate with communities and recognise them as assets and partners rather than customers and service users.



Kendal Library

Community Asset Transfer

The disposal of property needs to ensure the achievement of good practice and where appropriate, that the maximum benefit of the asset is realised. This can be achieved through obtaining the highest sale value or, where appropriate, meeting wider community and / or social value objectives supported by the Council.

We recognise that Community Asset Transfer (CAT) is one of the ways in which our corporate policies can be achieved. The assets that the council owns in local communities may play an important part in enabling appropriately constituted groups to come together to offer communities a range of activities and services that benefit the social and economic wellbeing of an area.

Local people are often best placed to manage community facilities in their area. They already make extensive use of these assets and their local knowledge and hands-on management often results in lower overheads and better value-for-money. Community organisations also use volunteers and take great pride in their local area.

Managing these facilities can help to empower local communities and can bring opportunities for greater independence and financial sustainability. When done well, and underpinned by a viable and robust business rationale, a CAT can create lasting change in local communities

We are fully committed to using our assets to form long-term partnerships with suitable Voluntary, Community, Faith and Social Enterprise (VCSFE) organisations, to create stronger, more cohesive and more sustainable communities. We and have produced a CAT Policy and a Community Lettings Policy which sets out our policy position and provides guidance on the circumstances and approach by which the Council will lease of property assets to community groups. These Policies sits alongside the Council's Asset Challenge approach and Property Disposal Policy.

The Property Disposal Policy sets out the process for ensuring that when considering disposal of any form, all factors are considered. This enables balanced judgements, as appropriate in each individual case. It will mean that all communities will have equality of opportunity.

Supporting our Service Areas

In support of service areas across the Council and external partners, the strategy will enable and facilitate service transformation both directly and indirectly by maximising the use of assets across the Council and wider Public Sector. Examples of these include:

Transition and Transformation Programmes

To deliver our ambitious programme for transition and transformation we will need a confident, empowered, and inclusive workforce.

We will support employee wellbeing, nurture talent, and create a healthy working environment that enables everyone to fulfil their potential and a place where the whole workforce is focused on delivering great services. Our buildings will need to offer the space and flexibility to support our staff in their role of supporting customers.

There is a real focus on becoming a more digitally enabled and agile organisation/workforce, having more empowered staff, encouraging and enabling innovation, being data and intelligence driven, ensuring collaboration within council services and with partners.

The impact of this on our buildings include the need to have workplaces that are flexible enough to enable this agile approach to working. This will include more shared spaces (for teams, partners, and the community); accommodation that supports innovation and change (e.g. project and collaboration spaces); more informal meeting spaces, less formal office/desk space, and the ability for staff to work anywhere in the area (not just in council offices).

We will need to think about our “front door” or customer facing spaces more deeply - what are they for, how do we design them so that they best meet the needs of customer and community but are flexible enough for this to change as needs/use may shift over time.

Health and Wellbeing

The Council has an aspiration to improve the overall health and wellbeing of our communities which will see our services delivered as close as possible to where people live. This will ensure that people have access to the right services in the right place at the right time. We will work with our partners in the use of assets to support this approach and in maximising the way that our facilities support integration of service delivery and a physical infrastructure including housing, transport and an environment that promotes healthy behaviour. One key theme is the launch of the ‘Family Hub’ as a new model for bringing together provision of advice and support services for families under one roof to improve their health and wellbeing.

Housing and Supported Living

The Council is committed to the effective and efficient management of our resources and assets to meet housing need. This could be through the conversion of underused or surplus council buildings into housing units, the provision of land for new housing or, as an enabler or provider of affordable homes. Over the life of this strategy we will work with our housing services to adapt our approaches in response to the wider investment priorities and strategic objectives of the Council and external environments as current thinking, regulation and technological solutions evolve.

Supported Living empowers vulnerable adults, including older people, people with learning disabilities or complex care needs, to access the personalised support they need to live independently in their own homes in the community. The Council aims to increase the availability of Extra Care Housing schemes. The Council will facilitate the development of new schemes across a range of tenures. The Council is an 'enabler' to delivery, providing demand intelligence, guidance and in some circumstance capital, assets and land, or a combination of both these areas.

Education and Inclusion

Education provision within Westmorland & Furness is through several providers. The Council directly owns and oversees management of community schools. It has an indirect relationship with others such as academies, faith based and free schools. The Council will continue to shape its education vision through the life of this strategy and work to ensure the school estate is efficient and fit for purpose within our financial constraints.

The current estate requires significant maintenance and capital expenditure to make it more efficient and suitable for today's education needs. We are moving towards a revised vision for maintenance where we will focus on a more strategic planned approach rather than one that reacts when things go wrong. At the same time we will work with governing bodies, staff, pupils and school communities to ensure we have the right number of schools in the right locations as the population changes across the region.

We are also working with agencies across our area on how we can improve the quality and accessibility of services for children and young people with Special Educational Needs and/or Disabilities (SEND) and provide appropriate facilities to support this ambition.

Children and Families

Care for Children is provided through a range of solutions: fostering, residential care, adoption and externally provided placements (residential homes and independent fostering agencies). There is a need to continuously improve and ensure the facilities we use to support this are appropriate.

The council owns several Childrens and Family Centres, which increasingly act as community hubs. It is important that these assets are fit for purpose and in the right location for the service.

ICT/Digital

The Council's ambition is to develop digital solutions that meet the needs and aspirations of service users. This involves a multi-channel approach to ensure face to face delivery is supported by more transactional functions on online platforms, so that the whole population can access information and services through the most effective medium for each individual.

We will embed modern and innovative technologies and practices within a culture of innovation and continuous improvement. This will be supported by data and insight to enable needs led and informed evidence-based decisions.

We will challenge how our current assets support this vision and work to adapt the estate to provide the most effective solutions to our proposed approach.

People Management

We are a caring council and our seven values describe the beliefs and principles that guide how we work and the decisions we make. We will help our workforce bring these values to life every day, investing in their personal growth and fostering a learning culture that attracts and retains talent. Our asset base will need to support this, providing appropriate facilities in the right locations, adopting modern and innovative technologies and practices in the workplace that our staff enjoy using and that help them spend as much time as possible on the valued services we provide.

Organisational Development

The Council is on a journey that aims to embrace and implement the characteristics of a modern workplace. The Council recognises modern workplaces need character and challenge to attract the best talent through:

1. High quality spaces in which everyone feels valued and comfortable.
2. Making sure teams have plenty of work, challenges and opportunities for individual and team achievement.
3. Setting clear deliverable goals.
4. Sharing knowledge, encouraging collaboration, encouraging transparency and trust.
5. Enabling flexibility and the ability to adjust their work schedule to their busy lives and optimising productivity.
6. Encouraging development, growth and new learning.
7. Supporting social initiatives such as education, organised events, knowledge sharing.

Sustainable Highways

The Council has over 2,600 miles of carriageway and an estimated value of £4 billion. The highway network is a significant asset which the Council needs to ensure is effectively maintained and managed so that the network can contribute to the achievement of strategic priorities as well as support better outcomes for the area. Reductions in Government funding and the need to invest in highways maintenance schemes, mean it is important to streamline resources to get maximum value from highways assets and to optimise funding and investment.

The building assets currently used to support our sustainable highways function need to be fit for purpose. We will regularly review their location, suitability and performance including working with partners and other council services where appropriate to ensure they are performing as necessary. Our land and buildings will also play a significant role in the development of an effective EV charging infrastructure across the council area.

Climate & Natural Environment

Protecting and enhancing our land and natural assets is essential for our communities, business, tourism, recreation, wellbeing and biodiversity. We manage a variety of land and natural assets across the council area including parks and open spaces, cycling and walking routes, coastal and lake infrastructure (including a marina) and allotments.

We will review and manage these assets to support healthy and quality of life through access to a range of sustainable recreation and leisure opportunities.

Key challenges include climate change, reduction in biodiversity, flood risk and coastal erosion and we will develop our policies particularly in relation to the risk management of these issues over the life of this strategy. Approaches will include the decarbonisation of the corporate estate, supporting flood mitigation projects, and through increased tree planting on council land.

Customer Strategy

The Council Plan aims to put our customers at the heart of everything we do and our assets will play an important part within this vision. We will put our customers and communities' needs at the heart of designing our services, supporting customers to be able to access services and information easily using a channel of their choice.

Our estate will need to facilitate this through a multi-channel approach including face to face public access, supported digital inclusion, free Wi-Fi, and utilising other data and technology approaches to seek to provide access to minority groups as outlined within our 'Customer Strategy'. Where our assets provide a 'front door' to Council services in key anchor buildings we will work to ensure they provide a welcoming environment.

Leisure and Culture

The Council manages and maintains a number of leisure and cultural assets including a range of sports and leisure centres, music and arts venues, historic assets and museums. Whilst these assets are often at the heart of our community identity and help to transform people's lives, they have been some of the most neglected over recent years. We need to look after them appropriately and there is a need to balance the social value they provide against harder financial performance measures. Over the life of this strategy we will develop a measurement framework for such facilities ensuring we establish their contribution to our communities in the widest sense and develop a plan to manage them effectively, working with partners and the community where appropriate.

Safe & Strong Communities

The creation of a new council gives us a fresh opportunity to ensure that we are close to the residents and businesses that we serve. 'Confident, empowered and resilient communities' are a council priority and the Council is working closely with residents and businesses to enable them to shape their own destiny and thrive. Strong links are being forged with parish and town councils, local community groups and other organisations. There is a commitment to devolving power, decision making and finances to local areas and keeping local government local by retaining a visible presence in our towns. The Community Asset Transfer process will facilitate some of these initiatives, subject to upholding appropriate checks and balances to ensure that transfers only progress in appropriate circumstances.

In addition, we will examine our town centres and wider region developing approaches to bring underused assets back into effective use in order to stimulate and support growth. This may include buying land to facilitate economic development where appropriate.

Long-term partnerships with key landowners

The Council provides the chair for the Westmorland & Furness Community Safety Partnership, which has a prevention and early intervention approach where children and young people are the key focus. This partnership includes Cumbria Fire & Rescue Service, Cumbria Constabulary, NHS Integrated Board and the Probation Service, as well as representation from the voluntary and third sector.

Through the Health and Well-being Board the council co-ordinates activity with the Clinical Commissioning Group (CCG) and Health Partners. Through the Contingency and Emergency planning forum the council co-ordinates with Blue Light Services and through Locality Planning, the Council works with the local community.

Through Inclusive and Green Growth (Economic Development, the Local Plan and Development Management processes), the Council works with major stakeholders including BAE Systems as a key local employer.



Climate Change: De-carbonisation

Background

Climate change is the long-term shift in global temperature and weather patterns. The changes observed in the Earth's climate since the 20th century are primarily driven by human activity and in particular, by burning fossil fuels. After varying levels of effort and ambition from different countries, the Paris Agreement was adopted by 196 Parties at the Conference of the Parties (COP) 21 event held in Paris in 2015. This Agreement aims to limit global warming to below 2°C – or preferably 1.5°C – when compared to pre-industrial levels.

The Intergovernmental Panel on Climate Change (IPCC) special report on Global Warming, published in October 2018, describes the enormous harm that a 2°C rise is likely to cause compared to a 1.5°C rise. The report went on to say that limiting Global Warming to 1.5°C may still be possible with ambitious action.

In 2019, the UK government amended the 2008 Climate Change Act to strengthen its climate ambition, legislating for a target to reduce the UK's emissions to Net Zero by 2050. We have seen significant and encouraging legislative and policy developments in the last few years including the Environment Act 2021, UK Net Zero Strategy and UK Hydrogen Strategy, as well as ambitious carbon budgets set for the 2023-2037 period and a commitment to total UK electricity grid decarbonisation by 2035.

Westmorland and Furness Context

Climate change has already impacted on the natural and built environment of Westmorland and Furness. The 2019 UK Climate Projections predict changes relevant to Westmorland and Furness' landscape including:

- Greater temperature extremes
- Hotter, drier summers increasing risk of wildfires, and wetter, warmer winters
- More intense and frequent rainstorm events e.g. Storm Desmond in December 2015
- Significantly decreased snowfall
- Sea level rises causing coastal change and flooding
- Summer soil moisture decreases
- Changes in biodiversity and species loss

The Westmorland and Furness Council Plan was adopted in April 2023 when the new Unitary Authority was established. The plan commits to providing 'leadership in the drive to become carbon net zero' and 'working hard to ensure that the area we serve becomes carbon net zero by 2037, and our organisation, as soon as possible'.

Westmorland and Furness Council recognise that in our response to the climate change emergency, our biggest opportunity and role is to mitigate carbon emissions but to address climate change we must work with partners, businesses and communities.

The Zero Carbon Cumbria Partnership brings together over 80 organisations spanning the public, private and third sectors, with a shared aim of reducing emissions. Through this partnership, Westmorland and Furness Council agreed to set our ambitious net zero target, following the partnership commissioning a Cumbria Carbon Baseline Report in 2020.

The Council's Climate Action Plan Part One was agreed in July 2023 and 'lays the foundation of the Council's drive to respond to the climate emergency'. Part Two of the Action Plan was agreed in January 2024 and identifies over 100 suitable actions to reduce emissions, reduce environmental inequalities and create a climate positive council culture, building on the council's 'ecologically aware' value.

Westmorland and Furness Council Corporate Estate

Also approved in January 2024, the Carbon management Strategy 2024-2029 identifies the key Council operational service areas producing the greatest emissions, using a baseline year of 2019/20. The Council's operations result in greenhouse gas emissions at Scope 1,2 and 3 levels of 84,551 tCO₂e. This is roughly equivalent to the annual carbon emissions of 9543 households. Of the total emissions calculated, 13% (11,201 tCO₂e) of the baseline is attributable to Scope 1 and 2 emissions. These are largely the result of natural gas and electricity consumption in Council buildings, as well as Council-owned vehicle use.

This assessment allows for the identification of a clear approach to reduce, and ultimately move the Council's emissions towards a Scope 1 and 2 net zero carbon position by 2037 and Scope 3 emissions by 2050, or sooner. The overall strategy identifies four delivery workstreams to address the core areas of emissions:

Buildings Emission Management – Scope 1 and 2 emissions associated with the operation and management of corporate buildings and schools. This strategy focuses on behaviour changes, building fabric improvements, energy reduction measures, Improvements to building management systems and Installation of renewable energy on buildings (where appropriate).



Transport Emission Management – Management of the Scope 1, 2 and 3 emissions that are applicable to operation and management of both the plant, equipment and vehicles directly owned and operated by the Council and a strategy for the emissions associated with staff commuting and the use of personal cars for business trips.

Supply Chain Emissions Management – This is associated with the purchases and contracts required for the operation and delivery of the Council's services, in particular, delivery of the capital programme (including highways contracts) and the operation of care services.

Residual Emissions – The proposed building and transport energy reduction measures will electrify the Council's building energy demand and the majority of its fuel demands, leaving residual Scope 1 & 2 emissions of 5,658 tCO₂e due to electricity usage (5,275 tCO₂e), gas use in older buildings (275 tCO₂e) and HVO fuel consumption (108 tCO₂e). Sandscale 2MW solar farm is in construction, and should be sufficient to offset the residual 383 tCO₂e produced by gas in buildings and HVO fuel use that must be in-set. In the event that the UK Government does not hit their target to decarbonise the national electricity grid by 2035, or is only partially decarbonised, more extensive carbon insetting measures to achieve net zero Scope 1 and 2 will be required.



Planning for Change

This document outlines the key strategic objectives for the Council's land and buildings over the next five years. Our Asset Management Action Plan further describes the specific activities to achieve these objectives, categorised under three key thematic headings of Strategic, Operational and Service Improvement actions.

The Asset Management Strategy will be reviewed annually by Cabinet, whilst the Asset Management Action Plan will be managed, monitored and updated continuously reporting through Resources Directorate Management Team and CMT and the relevant portfolio holders. This means that the document will be continually changing to reflect achievement of actions and capturing new priorities and initiatives, as they are identified.



Sandgate School, Kendal

Action Plans



Windermere

Asset Management Action Plan – Strategic

| Action No | Action Description | SMART objective | 2024/25 | 2025/26 | 2026/27 | Accountability | Resources |
|-----------|---|--|--------------------|---------|---------|---|-----------------------|
| S1 | Draft Asset Management Policy and Strategy shared with senior officers and Members. | Officers and Members consulted as part of process of producing emerging documentation, themes and management action plan. Approved by CMT. | (2023/24) | | | Assistant Director - Corporate Assets, Fleet & Capital Programme / Strategic Asset Management Lead | Internal and External |
| S2 | Adopt the Strategic Asset Management Strategy | Cabinet approve the adoption of the Council's Strategic Asset Management Strategy 2024-2029. | June 2024 | | | Director of Resources (s151) / Assistant Director - Corporate Assets, Fleet & Capital Programme | Internal and External |
| S3 | Successfully implement Strategic Asset Management | Services and Members continually engaged in delivery and review of Action Plan objectives and outcomes. | June 2024 onwards | Ongoing | Ongoing | Assistant Director - Corporate Assets, Fleet & Capital Programme / Senior Manager – Capital Programme / Corporate Assets managers | Internal and External |
| S4 | Implement comprehensive adoption of CAFM system (Concerto) | Full data population of Concerto and ongoing use by Corporate Assets and Capital Programme Teams and contractors. Develop Concerto as a formal feeder system into E5 (finance ledger system) | April 2024 onwards | Ongoing | Ongoing | Assistant Director - Corporate Assets, Fleet & Capital Programme / Senior Manager – Capital Programme / Corporate Assets managers | Internal and External |
| S6 | Decarbonisation Strategy | Successfully implement the Decarbonisation Strategy. | Ongoing | Ongoing | Ongoing | Assistant Director - Corporate Assets, Fleet & Capital Programme / Senior Manager – Capital Programme / Building Compliance Manager | Internal and External |

| Action No | Action Description | SMART objective | 2024/25 | 2025/26 | 2026/27 | Accountability | Resources |
|-----------|---------------------------------------|---|---------|---------|---------|---|-----------------------|
| S7 | One Public Estate | To continue engagement in the One Public Estates Programme and to review past projects. | Ongoing | Ongoing | Ongoing | Assistant Director - Corporate Assets, Fleet & Capital Programme | Internal and External |
| S8 | Assets and Organisational Development | Assets considerations to be part of the Organisational Development Programme, supporting organisational development to deliver Our Ways of Working. | Ongoing | Ongoing | Ongoing | Director of Resources (s151) / Assistant Director - Corporate Assets, Fleet & Capital Programme | Internal |
| S9 | Assets and Change and Transformation | Assets considerations to be part of the Change and Transformation Programme, subject to Financial Sustainability and Resource Optimisation to deliver Council Priorities. | Ongoing | Ongoing | Ongoing | Director of Resources (s151) / Assistant Director - Corporate Assets, Fleet & Capital Programme | Internal |



Asset Management Action Plan – Operational

| Action No | Action Description | SMART objective | 2024/25 | 2025/26 | 2026/27 | Accountability | Resources |
|-----------|--|---|--------------|-----------|---------|---|-----------------------|
| O1 | Corporate Landlord rollout (Corporate Buildings) | To rollout Corporate Landlord model to former district portfolios and develop a Corporate Landlord Guide on Corporate Buildings (including promoting need for 'active and responsible asset owners' across W&F asset base). | March 2025 | | | Assistant Director - Corporate Assets, Fleet & Capital Programme / Corporate Landlord Manager | Internal |
| O2 | Undertake an Asset Management 'Health Check' | To commission an Asset Management Health Check - RICS / CIPFA standard. | March 2025 | | | Assistant Director - Corporate Assets, Fleet & Capital Programme / Strategic Asset Management Lead | Internal |
| O3 | Adopt Whole Life Cycle Condition Surveys | To implement Whole Lifecycle (30 year) Condition Surveys across all maintained assets to provide greater detail when prioritising spend. | March 2025 | | | Assistant Director - Corporate Assets, Fleet & Capital Programme / Senior Manager – Capital Programme / Building Compliance Manager | Internal and External |
| O4 | Develop the detailed maintenance programme | To develop a high-level 5-year Stock Investment Forecast, informed by Condition Surveys. | | Sept 2025 | | Assistant Director - Corporate Assets, Fleet & Capital Programme / Senior Manager – Capital Programme / Building Compliance Manager | Internal and External |
| O5 | Reprocurement of Reactive and Statutory Maintenance Contract | Successfully reprocure the reactive and statutory maintenance contract. | October 2024 | | | Assistant Director - Corporate Assets, Fleet & Capital Programme / Building Compliance Manager | Internal and External |

| Action No | Action Description | SMART objective | 2024/25 | 2025/26 | 2026/27 | Accountability | Resources |
|-----------|---|---|-------------------|---------|---------|---|-----------------------|
| O6 | Asset Challenge, Optimisation and Investment | To commence a programme of Asset Review and Challenge. Surplus assets to be assessed in accordance with 'Asset Assessment Process Prior to Sale.' | Sept 2024 onwards | Ongoing | Ongoing | Assistant Director - Corporate Assets, Fleet & Capital Programme / Senior Manager – Capital Programme / Corporate Assets managers | Internal |
| O7 | Our Ways of Working / Workplace Transformation Plan | To develop a Workplace Transformation Plan across the entire Corporate Asset base to capture workforce and customer requirements including alternative models to support home working and digital innovation. | March 2025 | | | Assistant Director - Corporate Assets, Fleet & Capital Programme / Directors and Assistant Directors from across Council | Internal and External |
| O8 | Major Programme support | To work with other Council services (especially Thriving Places) to support delivery in line with outputs. | Ongoing | Ongoing | Ongoing | Assistant Director - Corporate Assets, Fleet & Capital Programme / Senior Manager – Capital Programme / Directors and Assistant Directors from across Council | Internal and External |
| O9 | Deliver the Asset Valuation Programme | To manage the annual programme of work associated with the Asset Valuations in accordance with the requirements for the annual statement of accounts. | Ongoing | | | Assistant Director - Finance / Assistant Director - Corporate Assets, Fleet & Capital Programme / Estates & Investment Manager | Internal and External |
| O10 | Establish and deliver the Disposal Programme | To establish and deliver a programme of asset disposals to support the financial sustainability of the Council. For 2024/25 deliver on agreed revenue savings and identify future potential savings. | Dec 2024 onwards | Ongoing | Ongoing | Assistant Director - Corporate Assets, Fleet & Capital Programme / Estates & Investment Manager | Internal and External |

Asset Management Action Plan – Service Improvement

| Action No | Action Description | SMART objective | 2024/25 | 2025/26 | 2026/27 | Accountability | Resources |
|-----------|--|---|--------------|---------|---------|---|-----------------------|
| SI1 | Develop Schools' Landlord approach | Identify clearly the role of the Council's Capital Programme and Corporate Assets Teams in relation to maintained schools. To develop a Corporate Landlord Guide for schools. | March 2025 | | | Assistant Director - Corporate Assets, Fleet & Capital Programme / Senior Manager – Capital Programme / Corporate Landlord Manager | Internal and External |
| SI2 | Closer liaison between Reactive Maintenance, Planned Maintenance and Capital Programme functions | Building Compliance and Capital Programme Teams to work more closely together than during pre-LGR era, utilising CAFM system (Concerto), earlier liaison on capital projects prior to handover and through Property Board. Provide greater client 'Asset Owner' technical guidance when taking investment/ maintenance decisions and assessing value for money. | Ongoing | Ongoing | Ongoing | Assistant Director - Corporate Assets, Fleet & Capital Programme / Senior Manager – Capital Programme / Building Compliance Manager | Internal |
| SI3 | Establish and expanded Directly Employed Technical Team for low value reactive maintenance | Expand existing team in South Lakeland area to cover whole area of operation. To be funded from within existing maintenance budgets. | October 2024 | | | Assistant Director - Corporate Assets, Fleet & Capital Programme / Building Compliance Manager | Internal |
| SI4 | Establish a Corporate Building Management resource | To create a Corporate Building Management Team that coordinates 'Building Representatives' supporting the delivery of Compliance and Health and Safety. Manage Resources H&S Committee and sit on Senior H&S Officer Group. | Ongoing | Ongoing | Ongoing | Assistant Director - Corporate Assets, Fleet & Capital Programme / Senior Manager – Capital Programme / Building Compliance Manager | Internal |



Translation Services

If you require this document in another format (e.g. CD, Braille or large type) or in another language, please telephone: **0300 373 3300**.

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