

ATRIUM PROPERTY MANAGEMENT SYSTEM

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WHAT BENEFITS WILL THESE PROPOSALS BRING TO COPELAND RESIDENTS?

The implementation of an effective electronic property management system will allow better management of the Council's property portfolio, enabling improved service provision.

WHY HAS THIS REPORT COME TO THE EXECUTIVE?

It was agreed by Executive in 2011 that a capital sum of £20,000 would be allocated to support the installation of an effective electronic property management system. This report is to inform Executive of the current position in this regard and ask for confirmation of the release of the capital sum to allow the proposals to be implemented.

RECOMMENDATIONS: That Executive agrees to the proposals outlined within the attached project brief and agrees to the release of £20,000 of capital monies to fund the project.

1. INTRODUCTION

1.1 The Council does not currently operate a computerised property management system. Instead details of the Council's property portfolio are held on spread-sheets used in conjunction with archived data and a paper based mapping system.

1.2 Executive has agreed in principle that an effective computerised property management system is essential to enable efficient management of the property portfolio and conform to best practice and the Council's Corporate Plan.

2. PROPOSALS

2.1 Following lengthy and detailed discussions with Cumbria County Council it is proposed to share the use of their current electronic property management system 'Atrium'.

2.2 The implementation of the Atrium system will provide a single source of property information with wider access across the Council, and externally via remote links with the potential for shared use.

2.3 The attached Project Brief outlines the proposals in detail and provides a strong business case for the implementation of the project.

3. ALTERNATIVE OPTIONS TO BE CONSIDERED

3.1 None

4. CONCLUSIONS

4.0 The implementation and use of the Atrium system will address both the strategic and operational needs of the Council's property assets, supporting the Council's Corporate Asset Management Plan. It will assist in reducing costs, adding value and improving the performance of property through better management of the Council's property assets.

5. RESOURCE IMPLICATIONS

5.1 The project will be managed within the Property Services Section utilising existing staffing resources.

6. STATUTORY OFFICER COMMENTS

Section 151 Officer comments are: The current capital program includes an allocation of £20k for the implementation of this project. There is however no revenue allowance for any non capital costs and so any arising in current or future years will need to be met from existing revenue budgets.

Monitoring Officer comments are: No comments

EIA Comment: No comment.

Policy Framework Comment: The Council is committed to programme of ICT enabled change, designed to drive efficiencies and improve our underlying systems of work. These projects are also designed to address known issues and risks. This is one such project which is designed to improve the efficiency, performance and business continuity within the property service.

6. HOW WILL THE PROPOSALS BE PROJECT MANAGED AND HOW ARE THE RISKS GOING TO BE MANAGED?

6.1. The project will be overseen by the Estates & Valuations Manager and the implementation supported by the Technical Support Officer, with the assistance of the GIS Officer and IT services.

7. WHAT MEASURABLE OUTCOMES OR OUTPUTS WILL ARISE FROM THIS REPORT?

7.1 Allows current staffing resources to concentrate more fully on income creation through better property management aligned to the Asset Management Plan.

List of Appendices

Appendix A – Atrium Property Management System Project Brief

List of Background Documents:

Corporate Plan

Asset Management Plan

ATRIUM PROPERTY MANAGEMENT SYSTEM

PROJECT BRIEF

ID: ATRIUM
Version: One - draft
Author: Barbara Vernon
Date: 27/7/13

1. Background

1.1 Details of the Council's property portfolio were originally held on an electronic property management system (Mentor) which was commissioned in the mid 1990's and for which the supplier's IT support was withdrawn in 2004. The information Mentor contained was archived as a read only Access database at that time. Around the same time the Council's Estates Management and Valuation functions were outsourced to Capita Symonds. As part of the outsourcing contract it was agreed that Capita would hold the Council's basic property data within a system called Propman. The Propman system was owned and managed by Capita. The basic information held on Propman was run alongside the archived data from Mentor to create an effective electronic property management function.

1.2 The Council's estates and valuation functions were brought back in-house in 2011. As the Council did not have a functioning property management system the data from Propman was downloaded onto an Excel spread-sheet and this, together with the archived Mentor data is currently used to manage the Council's property management portfolio.

1.3 Property Services also currently maintains a paper based mapping system showing assets owned and the boundaries of that ownership. The plans are colour coded and were created in the early 1990's alongside the implementation of the Mentor system and are updated on a regular basis. These plans are in A1 format and are stored in plan chests kept within Property Services.

1.4 The commissioning of an electronic property management system is essential to support the need for more efficient and effective working and to manage the continually changing pressures within Property Services.

1.6 Discussions are underway and agreement has been reached with Cumbria County Council regarding this Council sharing the use of their property management system, Atrium. We are able to do this on a remote access basis with the appropriate Administrator and User permissions put in place. This would fulfil the Council's requirement for an effective electronic property management system and supports the Council's Corporate Plan mission statement.

2. Outline Business Case

A fully functional property management system will enable all the data held in the varying formats on the Council's land holdings to be recorded onto one system via electronic data transfer with some manual checking, scanning and archiving of old data. The new system will form a base on which to build an effective and efficient property management data base.

2.1 The System

2.1.1 The system provider Atrium Software Ltd. is part of the Manhattan Software Group, an international company with over 20 years' experience in delivering asset management solutions, who offers a range of software products underpinned by a range of implementation and support services.

2.1.2 Atrium software was installed by Surrey County Council and Hampshire County Council in March 2012. The aim was to procure a system that could span all public sector organisations, providing a common single source of information about assets belonging to each public sector body with appropriate access controls. This system installation was aimed at facilitating partnership working.

2.1.3 In 2010 Cumbria County Council (CCC) installed the Enterprise Asset Management Suite software of the Atrium system to allow effective management of their property assets. One of the reasons this software was chosen was the ability to share data and to facilitate partnership working. The system has therefore been fully functional for around 12 months and CCC finds it a valuable resource to support an effective estates management function.

2.1.4 The system offers major key benefits as outlined in 2.5, together with having the ability to interface with GIS, CAD, MS Office and data input on PDAs and Tablets.

2.2 Proposals

2.2.1 CCC is offering to share the use of the Atrium system with other local authorities and key partners. The Atrium system will therefore belong to and be hosted by CCC.

2.2.2 CBC's data will be electronically uploaded onto the system by Atrium Software Ltd., supervised by both CCC and CBC. Subsequently CBC will have remote access to its data via a web based connection. To ensure confidentiality is maintained, appropriate permissions and access restrictions will be put in place with a confidentiality agreement between the parties being implemented.

2.2.3 It is proposed that the Council's paper based mapping system is digitally captured. The images can then be linked via GIS software to each record within Atrium as the system has a GIS and CAD interface that will allow this. Other relevant information relating to the holding, for example photographs, occupation agreements, deeds, topographical and condition surveys, mining and contaminated land data and the like can also be linked.

2.2.4 The Atrium system will also enable effective and accurate risk mapping. Risks that exist are significant and in the majority of cases unknown to the Council. By mapping the currently known risks the Council will have a clearer picture of where risks lie, and can then quantify and subsequently effectively manage those risks.

2.3 Asset Management Plan

2.3.1 The use of the Atrium system will address both the strategic and operational needs of the Council's property assets, supporting the Council's Corporate Asset Management Plan. It will assist in reducing costs, adding value and improving the performance of property through better management of the Council's property assets.

2.4 IT and Interfaces

The main system is hosted by Atrium Cloud, deploying the application via a highly secure and proven data centre. The software is fully web enabled, with access is via the internet, the user only needing a modern web browser and internet access to successfully use the software from within the office, at home or on site.

Additional Features offered by Atrium are system-wide facilities that wrap around the Estates Management package. These include:

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- GIS Integration (Map Viewer)
- CAD Integration (EAM Drawing Viewer)
- Adhoc & Advanced Reporting
- Web Portals
- Dashboards
- Integration Layer (Interfaces)
- Mobile Working (PDAs & Tablets)
- MS Office Integration
- Automated Email Notifications
- Document Management
- Workflow
- Flexi-fields & Data Templates
- Archiving
- Auditing

2.5 Key benefits

2.5.1 Key benefits include;

- Provides a single source of information with wider access across the Council, and externally via remote links with the potential for shared use.
- Savings over other property management systems from lower maintenance costs, smarter procurement and process efficiencies.
- More efficient access to information.
- Improved project management.
- Better assessment of property performance.
- Improved space management and tracking of vacant space.
- Ability to host data in other formats such as CAD plans, GIS data, word and excel documents.
- Supports advanced handheld condition survey software.
- Provides real time key performance indicators.
- Provides comprehensive reporting.
- Facilitates business transformation.
- Can host additional modules to provide facilities management improvement opportunities in the form of reactive repairs and integrated helpdesk facilities.
- A web based facility that allows data sharing with the ability to implement strict security levels by either complete access restrictions to other external users, read only permissions or full administrator rights.

2.6 Cost Benefits

2.6.1 Other effective electronic property management systems are available on the market to purchase at a cost of between £60-100k. However, as the Atrium software has been acquired and installed by CCC, the initial capital outlay has been absorbed by them. There is therefore no required initial capital outlay from CBC in this regard. There are costs however in data migration, training, and on-going IT support as detailed in Project Costs below.

3. Project Definition

3.1 Project Objectives

3.1.1 The project objectives are;

- To support the co-ordinated corporate approach to asset management by consolidating several disparate databases and functions and reinforcing a structured, systematic and fully documented process.
- To support the Council's current Asset Management Plan and allow improved on-going management of the Council's property portfolio.
- To improve property asset performance and inform the decision-making processes.
- To improve the integration of capital and revenue spending decisions through consistent and effective asset management planning.

3.2 Project Scope

3.2.1 The project scope is to implement an effective electronic property management system to enable the benefits detailed in 2.5 above to be realised in the most cost effective way possible.

3.2.2 Any electronic property management system needs to, as much as possible, interface with the Council's current applications. This is particularly important for the GIS and any future new technology such as hand held devices that can be used on site. The Atrium system fulfils this requirement.

3.2.3 The current project scope centres on the estates and asset management modules of the system. There is potential to expand the system to encompass facilities management modules at an additional cost. This is something that the Council may wish to consider in the future.

3.2.4 By implementing the system the Council is not tying itself into any contract with either the Atrium Software Ltd. or CCC. The Council's data will be accessible and easily retrievable should the partnership between CBC and CCC break down.

3.2.5 The system is accessed via a secure internet connection and can be allocated varying access permissions from Administrator to read only. A confidentiality agreement between CBC and CCC will protect against conflicts of interest, misuse and retrieval of CBC data.

3.3 Project approach

3.3.1 The current CBC data bases will be checked and updated and will be handed over to CCC. This is currently underway and is estimated to take approximately 8 weeks. The confidentiality agreement will be in place prior to handover of data.

3.3.2 Atrium Software Ltd., supervised by both CBC and CCC, will undertake the initial data migration onto the Atrium system from the data provided by CBC. Estimated timescales for this is 4 weeks. During this time user training will be given.

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3.3.3 CBC will be given access to the CBC data held on CCC's system via a web based link and users will have varied permissions from read only to Administrator. CBC has exclusive rights to manage the access levels and spread to its data.

3.3.3. CCC's Atrium system administrator will have access rights to CBC's data, however there will be a confidentiality agreement in place between the parties to ensure confidentiality is maintained.

3.3.4 Once the data has been transferred the data will be manually checked and amended accordingly, again a timescale of approximately 4 weeks is expected.

3.3.5 The system will then be used as a base on which add data from other sources, including GIS, CAD, MS Office and the like.

4. Outline Plan and Resource requirements

Task	Owner	Estimate of time required	Involvement of other internal departments	Anticipated Completion Date
Initial data checking and export	EVM/PTO	8 weeks	N/A	end September 2013
Data migration	Atrium/CCC/EVM	4 weeks	N/A	end October 2013
Linking to CCC system, training and final data check	EVM/PTO	4 weeks	IT	end November 2013
Uploading plans/surveys/additional data	EVM/PTO/GIS officer	On-going	GIS officer/IT	On-going

Key - CCC – Cumbria County Council

EVM – Estates & Valuation Manager

PTO – Property Technical Officer

5. Project Costs

5.1 The project costs are outlined in the table below;

Description	detail		One off fee	Annual fee
Initial data migration based on 1,000 records	Electronic transfer of CBC electronic databases		£6,500	
Data migration management	CCC will oversee the data migration		£1,500	
Training	4 x 1 day training courses	from	(£3,000)	

		revenue budget		
Annual support and maintenance x 2 years	Delivered directly by Atrium Software Ltd.			£10,000
Contingency			£2,000	
Project costs total			£13,000	10,000

5.1.1 The costs estimated for data migration and management of the same are an estimate based on 1,000 property records. However, this may change once the service provider has had sight of the size, content and data sources. This cost will not be known until the confidentiality agreement has been confirmed and the Council's data handed over to CCC. Therefore at this stage a contingency of £2,000 has been included within the above costs to allow for movement around this cost.

5.1.2 The one-off training costs in the sum of £3,000 are to be found from the Property Services revenue budget.

5.1.3 Data migration could be undertaken manually. An estimate for manual input would be 8 properties per individual per day based on a medium site with multiple buildings/rooms and relevant estate management information. Based on 1,000 property records this would take approximately 125 working days or 25 weeks (circa. 6 months). Therefore;

Job Advertisement:	£ 1,500.00
6 Months' salary, Grade 6 member of staff (Subject to JE):	
Annual wage: £16,830.00 + £6,732.00 (employers' contribution say 40%)	
= £23,562.00 - Pro-rata (6 Months):	£11,781.00
Work Station:	<u>£ 1,000.00</u>
Total:	£14,281.00

5.1.3 The total cost of electronic data migration and overseeing the same through Atrium Software Ltd. and CCC amounts to £8,000, an estimated saving of £7,281 over manual inputting of the data. Once the data is transferred electronically there will be a requirement for manual checking. It is anticipated however that this will be undertaken by the Property Services Technical Officer as part of her duties and will be less onerous than if the data had been input manually as there is less room for human error.

6. Risks

Id.	Description of Risk	Impact	Probability
R1	Resource implications – Financial and HR	HIGH	LOW