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Council Building  
2 High Street  
Perth  
PH1 5PH

12/01/2024

A hybrid meeting of **Perth and Kinross Council** will be held in **the Council Chamber** on **Monday, 22 January 2024** at **13:00**.

If you have any queries please contact Committee Services on (01738) 475000 or email [Committee@pkc.gov.uk](mailto:Committee@pkc.gov.uk).

**THOMAS GLEN**  
Chief Executive

***Those attending the meeting are requested to ensure that all notifications are silent on their device and other devices are in silent mode.***

***Please note that the meeting will be broadcast online and recorded. The recording will be publicly available on the Council's website following the meeting.***

**Members:**

Provost X McDade  
All Councillors



**Perth and Kinross Council**

**Monday, 22 January 2024**

**AGENDA**

**MEMBERS ARE REMINDED OF THEIR OBLIGATION TO DECLARE ANY FINANCIAL OR NON-FINANCIAL INTEREST WHICH THEY MAY HAVE IN ANY ITEM ON THIS AGENDA IN ACCORDANCE WITH THE COUNCILLORS' CODE OF CONDUCT.**

- 1      **WELCOME AND APOLOGIES**
  
- 2      **DECLARATIONS OF INTEREST**
  
- 3      **MINUTE OF MEETING OF PERTH AND KINROSS COUNCIL OF 6 DECEMBER 2023 FOR APPROVAL**      5 - 12  
(copy herewith)
  
- 4      **OUTSTANDING BUSINESS STATEMENT (OBS)**      13 - 14  
(copy herewith 24/16)
  
- 5      **TAY FOREST NATIONAL PARK BID**  
Report by Executive Director (Communities) (copy to follow)
  
- 6      **CORPORATE ASSET MANAGEMENT FRAMEWORK**      15 - 212  
Report by the Director (Strategy, People and Resources) and Executive Director (Communities) (copy herewith 24/18)
  
- 7      **TRANSFORMATION REVIEW OF LEISURE ASSETS**      213 - 248  
Report by Head of Culture & Communities Services (copy herewith 24/19)
  
- 8      **LEARNING ESTATE**      249 - 266  
Report by Strategic Lead - Property Services and Executive Director (Education and Children's Services) (copy herewith 24/20)
  
- 9      **AFFORDABLE HOUSING MEMBER/OFFICER WORKING GROUP - AGENDA NOTE**      267 - 268  
(copy herewith)
  
- 10     **APPOINTMENT TO COMMITTEES/OUTSIDE BODIES**  
  
Councillor Jack Welch to replace Depute Provost Andrew Parrott on CoSLA Environment and Economy Board.  
Councillor Michelle Frampton to replace Councillor Eric Drysdale on Scrutiny and Performance Committee.
  
- 11     **ELECTED MEMBERS BRIEFING NOTES**

Council is asked to note the following [Elected Members Briefing Notes](#) that have been issued to elected Members since the previous Council meeting:

7 November 2023 Short Term Lets Update

22 November 2023 Carer Support Payment

30 November 2023 Negotiated Stopping Agreement for Gypsy/Traveller Encampment

30 December 2023 Weather Response Update

31 December 2023 Weather Response Update

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## PERTH AND KINROSS COUNCIL

Minute of hybrid meeting of Perth and Kinross Council held in the Council Chamber, 2 High Street, Perth on Wednesday 6 December 2023 at 10:30am.

Present: Provost X McDade, Depute Provost A Parrott, Bailies C Ahern, A Bailey, R Brock, C McLaren and M Williamson, Councillors K Allan, H Anderson L Barrett, P Barrett, B Brawn, S Carr, A Chan, D Cuthbert, S Donaldson, E Drysdale, J Duff, A Forbes, M Frampton, N Freshwater, K Harvey, D Illingworth, I James, N Khogali, G Laing, B Leishman, I MacPherson, I Massie, S McCole, T McEwan, J Rebbeck, C Reid, W Robertson, C Shiers, F Smith, C Stewart, G Stewart, R Watters and J Welch.

In Attendance: T Glen, Chief Executive; C Mailer, Director – Strategy, People and Resources; L Simpson, Strategic Lead - Legal and Governance; B Renton, Executive Director (Communities); S Devlin, Executive Director (Education and Children’s Services); K Donaldson, Chief Operating Officer; S MacKenzie, Head of Finance; S Walker, Strategic Lead – Finance & Business Support, D Littlejohn, Strategic Lead – Economy, Development and Planning, J Pepper, Director/Chief Officer – Health and Social Care Partnership/Chief Social Work Officer; K Smith (up to and including Item 5), S Panton (up to and including Item 5), F Robertson, A Seggie (for Item 8 only), L Haxton, D Stokoe, S Merone, C Grant (up to and including Item 7) (all Communities); G Fogg, P Johnstone, S Nicoll, S Hendry, A Brown and M Pasternak (all Corporate and Democratic Services).

Also Attending: D Black and J Campbell (both Glasgow City Council Audit Team).

Provost X McDade, Presiding.

The Depute Provost led discussion on Items 5, 6 and 7, and the Provost led discussion on all other items of business.

### 1. WELCOME AND APOLOGIES

Provost McDade welcomed all those present to the meeting.

Prior to the commencement of business, the Provost announced that he was delighted to inform all elected members about the signing of a letter of intent for Perth to twin with Nikopol, Ukraine. A report would be submitted to the Provost Sub-Committee in February 2024 to formally propose the twinning of the two cities.

### 2. DECLARATION OF INTEREST

In terms of Councillors Code of Conduct:

Councillor A Forbes declared a financial interest in Item 5.  
Depute Provost A Parrott declared a non-financial interest in Item 8.

### **3. MINUTE OF MEETING OF PERTH AND KINROSS COUNCIL OF 4 OCTOBER 2023 FOR APPROVAL**

The minute of meeting of Perth and Kinross Council of 4 October 2023 was submitted and approved as correct record.

### **4. BOYS NEED BINS MOTION**

#### Motion by Councillors J Duff and C Shiers

This Council notes:

- Prostate cancer is the most common cancer in men. 1 in 8 men will be diagnosed, rising to 1 in 4 for Black men. As many as 69% of those treated with surgery may experience urinary incontinence as a result.
- 1 in 25 men aged over 40 will experience some form of urinary leakage every year.
- 1 in 20 men aged 60 or over will experience bowel incontinence in the UK.
- Men who need to dispose of their sanitary waste (including incontinence pads, pouches, stoma, catheter, colostomy, ileostomy waste by-products) often have no direct access to a sanitary bin in male toilets.
- A survey of men living with incontinence reveals that 95% feel anxiety due to a lack of sanitary bins in men's toilets for disposing of pads hygienically.
- Nearly one third of men surveyed have been forced to carry their own waste in a bag.

This Council believes:

- that men should be able to safely and hygienically dispose of incontinence products easily and with dignity wherever they go.
- that men who need to dispose of their sanitary waste should have direct access to a sanitary bin in male toilets.

This Council resolves:

- To review and consider provision of sanitary bins within facilities normally accessed by adults – both public and in council buildings;
- To encourage other providers of public and workplace toilets in the Perth and Kinross area to make male sanitary bins available in their facilities;
- To support Prostate Cancer UK's 'Boys Need Bins' campaign

#### Proposed Amendment by Councillor T McEwan

In accordance with the Motion but to insert the following additional resolution:

- To support Prostate Scotland's drive to ensure more men in Scotland are aware of prostate disease and know where/how to get help and treatment by promoting Prostate Scotland's Workplace Toolkit and

Toolbox Workshops delivered by Prostate Scotland staff and volunteers within the Council and wider across Perth & Kinross.

The Mover and Seconder of the Motion agreed to incorporate the proposed amendment into the Motion.

**Resolved:**

In accordance with the Revised Motion.

HAVING PREVIOUSLY DECLARED AN INTEREST IN THE FOLLOWING ITEM, COUNCILLOR A FORBES WITHDREW FROM THE CHAMBERS AT THIS POINT.

**5. APPLICATION FOR PLANNING PERMISSION 21/01855/IPM**

There was submitted a report by Strategic Lead – Economy, Development and Planning (23/342) providing an update in relation to National Planning Framework 4 (NPF4) on the planning application related to ‘West Kinfauns’. The meeting of Perth and Kinross Council on 17 August 2022 resolved that it was ‘minded to grant’ the application, subject to a Section 75 Legal Agreement to secure developer contributions and further obligations. As NPF4 now forms part of the development plan, and the planning consent has not been issued, the Council is now obliged to reassess the application having regard to NPF4.

**Resolved:**

The application, subject to the proposed amended conditions and conclusion of the Section 75 agreement as detailed in Report 23/342, be approved.

COUNCILLOR FORBES RETURNED TO THE MEETING AT THIS POINT.

**6. REVIEW OF SCHEME OF ESTABLISHMENT FOR COMMUNITY COUNCILS**

There was submitted a report by Head of Culture and Communities Service (23/343) (1) providing an update on the statutory review of the Scheme of Establishment of Community Councils in Perth and Kinross; and (2) seeking approval of an amended Scheme, to be implemented from 1 January 2024 and to run until 2028.

**Resolved:**

- (i) The Scheme of Establishment for Community Councils for Perth and Kinross, as set out in Appendix 1 to Report 23/343, be adopted.
- (ii) The implementation date of 1 January 2024 be approved.
- (iii) It be agreed that a review of the Scheme of Establishment be carried out in 2028.

**7. REVIEW OF PARLIAMENTARY CONSTITUENCY POLLING DISTRICTS AND POLLING PLACES**

There was submitted a report by Strategic Lead – Finance and Business Support (23/344) (1) seeking views on proposed changes to the parliamentary

polling districts and polling places within the area of Perth and Kinross following the recent statutory review; and (2) providing an update on the polling districts and polling places that will come into effect following the next dissolution of the UK Parliament.

**Resolved:**

- (i) The contents of Report 23/344 be noted.
- (ii) The proposals for the designation of polling districts and polling places as set out in Appendix 1 to Report 23/344, that come into immediate effect, be approved.
- (iii) The proposals for the designation of polling districts and polling places as set out in Appendix 2 to Report 23/344, that come into place following the next dissolution of the UK Parliament, be approved.

**8. TAY CITIES REGION DEAL JOINT COMMITTEE PROPOSED CHANGES TO MEMBERSHIP**

There was a report submitted by Strategic Lead – Economy, Development and Planning (23/345) seeking approval to a change to the membership of the Tay Cities Region Joint Committee.

A Seggie advised of an error in Paragraph 4.3 of the report where it states the current representatives from Perth and Kinross Council are Councillors Grant Laing, John Duff and Sheila McCole. She advised this should in fact read Councillors Grant Laing, John Duff and Eric Drysdale.

**Resolved:**

The change to the membership of the Tay Cities Region Joint Committee, to allocate the vacant voting membership position to the Tayside and Central Scotland Transport Partnership (Tactran), be approved.

THERE FOLLOWED A SHORT RECESS AND THE MEETING RECONVENED AT 11.40AM.

BAILIE AHERN AND COUNCILLOR BRAWN BOTH DECLARED A NON-FINANCIAL INTEREST IN ITEM 10 AT THIS POINT.

**9. ANNUAL CLIMATE ACTION REPORT AND ACTION PLAN UPDATE**

There was submitted a report by Executive Director (Communities) (23/346) (1) providing an update on Perth and Kinross Council's progress in delivering its Climate Change Strategy and Action Plan; (2) reviewing overall performance and progress and exploring the progress in each of the eight themes identified in the plan; and (3) proposing an annual update to the action plan for 2024/25 and the associated resources required to deliver them.

**Resolved:**

- (i) The Climate Change Annual Report, as detailed in Appendix A, along with the associated detailed Action Plan for 2024/25, as detailed in Appendix B to Report 23/346, be approved.

- (ii) It be noted that the resources required to take forward the priority actions will be considered as part of the Revenue and Capital budget process.
- (iii) Members and officers be requested to continue to raise the resource and delivery challenges associated with addressing the climate and biodiversity emergency with COSLA, the Scottish and UK Governments, and other relevant bodies, whenever appropriate.

HAVING PREVIOUSLY DECLARED AN INTEREST IN THE FOLLOWING ITEM, BAILIE AHERN AND COUNCILLOR BRAWN WITHDREW FROM THE CHAMBERS AT THIS POINT.

## **10. TRANSFORMATION REVIEW OF ARMS LENGTH EXTERNAL ORGANISATIONS**

There was submitted a report by Head of Culture and Communities Service (23/347) (1) summarising the review findings and recommending next steps to secure the longer-term financial sustainability of culture and sport in Perth and Kinross; and (2) providing details of wider improvement recommendations to the Council's ALEO oversight arrangements.

### Motion by Councillors G Laing and E Drysdale

- (i) The Review findings as set out in Section 6 of Report 23/347 be noted.
- (ii) The recommendations as set out in Sections 6 and 7 of Report 23/347 be approved.
- (iii) The proposed next steps as set out in Section 8 of Report 23/347 be approved.
- (iv) Officers be instructed to bring a further progress update to a future meeting of Council in Mid-2024.

THERE FOLLOWED A RECESS AND THE MEETING RECONVENED AT 2.30PM.

COUNCILLOR ILLINGWORTH DECLARED A NON-FINANCIAL INTEREST IN THIS ITEM OF BUSINESS AT THIS POINT AND WITHDREW FROM THE CHAMBERS.

### Amendment by Councillors J Duff and K Allan

That recommendation 3 (A review of employment issues should be undertaken to assess any potential risks) be accepted and that the decisions on the remaining recommendations be deferred to a future meeting of Council so that an elected member briefing session on the Transformation Review of the ALEOs can be arranged.

Councillor C Stewart referred to Paragraph 7.1 – Summary of Recommendations of Report 23/247, specifically Recommendation 12, and queried whether the Mover and Secunder of the Motion would be willing to slightly amend the wording to read 'Review and consider the quarterly monitoring of ALEO's by Scrutiny and Performance Committee'. The Mover and Secunder of the Motion agreed to this request being incorporated into a Revised Motion.

In terms of Standing Order 21.5, a roll call was taken.

26 Members voted for the Revised Motion as follows:

Provost X McDade, Depute Provost A Parrott, Bailies A Bailey, R Brock, K Harvey, C McLaren and M Williamson, Councillors L Barrett, P Barrett, S Carr, D Cuthbert, S Donaldson, E Drysdale, M Frampton, G Laing, B Leishman, I MacPherson, I Massie, S McCole, T McEwan, J Rebbeck, W Robertson, C Stewart, G Stewart, R Watters and J Welch.

11 Members voted for the Amendment, as follows:

Councillors K Allan, H Anderson, A Chan, J Duff, A Forbes, N Freshwater, I James, N Khogali, C Reid, C Shiers and Smith.

**Resolved:**

In accordance with the Revised Motion.

BAILIE AHERN AND COUNCILLOR BRAWN RETURNED TO THE MEETING AT THIS POINT

**11. NON-DOMESTIC RATES RELIEF ON UNOCCUPIED LANDS AND HERITAGES**

There was submitted a joint report by the Team Leader (Local Taxes) and Service Manager (Revenues & Benefits) (23/348) providing (1) information on the devolvement of Non-Domestic Rates Relief on empty lands and heritages to Local Authorities; (2) a summary of the current numbers and value of such awards in the Perth and Kinross Council area; and (3) recommending a new Non-Domestic Rates Relief Scheme be introduced with effect from 1 April 2024.

Motion by Councillors G Laing and E Drysdale

- (i) The contents of Report 23/348 be noted.
- (ii) The level of Non-Domestic Rates Relief to be made available to ratepayers of unoccupied lands and heritages with effect from 1 April 2024 be agreed.

THERE FOLLOWED A SHORT RECESS AND THE MEETING RECONVENED AT 3.37PM.

At this point Councillor P Barrett moved a procedural motion (seconded by Councillor W Robertson) in terms of Standing Order 17.1 that no further discussion take place and a decision be taken on the Motion as it had been submitted. A roll call vote was then taken.

18 Members voted for the procedural motion as follows:

Bailies C Ahern and C McLaren, Councillors K Allan, H Anderson, L Barrett, P Barrett, B Brawn, A Chan, J Duff, A Forbes, N Freshwater, D Illingworth, I James, N Khogali, C Reid, W Robertson, C Shiers and F Smith.

20 Members voted against the procedural motion as follows:

Bailies A Bailey, R Brock and M Williamson, Councillors S Carr, D Cuthbert, S Donaldson, E Drysdale, M Frampton, K Harvey, G Laing, B Leishman, I MacPherson, I Massie, S McCole, T McEwan, J Rebbeck, C Stewart, G Stewart, R Watters and J Welch.

2 Members abstained as follows:

Provost X McDade and Depute Provost A Parrott.

Resolved: To continue with the debate.

Amendment by Councillors J Duff and Bailie C Ahern

In accordance with the Motion but in addition to the recommendations listed at paragraphs 11.5 and 11.6 of the report, the following additional bullet point be included in paragraph 11.5:

- That all monies allocated to Perth and Kinross Council for Non-Domestic Rates Relief on Unoccupied Lands and Heritages which are not utilised in supporting the revised scheme, to be used to protect business growth and economic development activity in line with the priorities identified in the Council's Economic Wellbeing Plan.

THERE FOLLOWED A SHORT RECESS AND THE MEETING RECONVENED AT 4.07PM.

The mover and the seconder of the Motion agreed to accept the Amendment into the Revised Motion.

**Resolved:**

In accordance with the Revised Motion.

## 12. COUNCIL TAX CHARGES FOR SECOND HOMES

There was submitted a joint report by Team Leader (Local Taxes) and Service Manager (Revenues & Benefits) (23/349) (1) providing information on the discretion available to Local Authorities to vary the amount of Council Tax levied on second homes from 1 April 2024; and (2) the current numbers and bandings of second homes to highlight the potential financial gains from implementing the available discretion.

**Resolved:**

- (i) The contents of Report 23/349 be noted.
- (ii) The level of charges to be applied to second homes from 1 April 2024, as set out in Report 23/349, be approved. It be further agreed that 50% of the net amount raised in the 2025/26 and 2026/27 budget process be committed to deliver affordable and social housing in rural areas.
- (iii) Officers be instructed to increase the identification of sites for affordable housing across the whole of Perth and Kinross.
- (iv) The use of existing protocols for the consideration of any discretion be approved.

### **13. UPDATE TO SCHEME OF ADMINISTRATION**

**Resolved:**

The proposed changes to the Scheme of Administration as set out on the agenda be agreed.

### **14. APPOINTMENT TO COMMITTEES/OUTSIDE BODIES**

**Resolved:**

- (i) Council agreed that Depute Provost Andrew Parrott be replaced by Councillor Eric Drysdale on the Environment, Infrastructure and Economic Development Committee and as Convener (as a result of this change Depute Provost Parrott to now receive the lower senior Councillor allowance).
- (ii) Council agreed that Bailie Mike Williamson be replaced by Councillor Jack Welch as Vice-Convener of the Environment, Infrastructure and Economic Development Committee.
- (iii) Council agreed that Councillor Richard Watters be replaced by Councillor Grant Laing on the Environment, Infrastructure and Economic Development Committee.
- (iv) Council agreed that Councillor Jack Welch be replaced by Councillor Grant Stewart on the Learning and Families Committee.
- (v) Council agreed that Councillor Tom McEwan be replaced by Depute Provost Andrew Parrott on the Climate Change and Sustainability Committee.
- (vi) Council agreed that Councillor Eric Drysdale be replaced by Councillor Stewart Donaldson on the Property Sub-Committee.
- (vii) Council agreed that Councillor Eric Drysdale be replaced by Councillor Tom McEwan as Vice-Convener of the Property Sub-Committee.

### **15. 2024 COMMITTEE TIMETABLE**

**Resolved:**

Council agreed that an additional meeting of Full Council be held on Monday 22 January 2024 at 1.00pm.

### **16. ELECTED MEMBERS BRIEFING NOTES**

**Resolved:**

The Elected Members Briefing Notes, issued since the previous Council meeting and as set out on the agenda, be noted.

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**PERTH AND KINROSS COUNCIL**

**OUTSTANDING BUSINESS STATEMENT (OBS)**

(Report No. 24/16)

Please note that this statement sets out outstanding decisions of Council / this committee / sub-committee along with an update and estimated completion date. Actions which are overdue are shaded for ease of reference. Where an update reflects that an action is complete then agreement will be sought to its removal from the OBS.

| <b>No</b> | <b>Date / Minute Reference / Report Number</b> | <b>Subject Title</b>                                          | <b>Outstanding Action</b>                                                                                                                              | <b>Update</b>                                              | <b>Lead Officer /Service</b>                  | <b>Action Due/completed</b> | <b>Action Expected</b> |
|-----------|------------------------------------------------|---------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|-----------------------------------------------|-----------------------------|------------------------|
| 14.       | 6 December 2023. Item 11.                      | Review of Scheme of Establishment for Community Councils.     | Query regarding requirement for Office bearers to be appointed / re-appointed and then dissolved during an election year for Community Councils.       | Email update provided to Elected Members.<br><br>COMPLETE  | Community Planning Team Leader                | COMPLETE                    | December 2023          |
| 15.       | 6 December 2023. Item 7.                       | Review of Parliamentary Polling Districts and Polling Places. | Elected Member Briefing Note to be circulated to all members on background / any proposals for next review of Local Government boundaries in Scotland. | Elected Members provided update via email.<br><br>COMPLETE | Strategic Lead – Finance and Business Support | COMPLETE                    | December 2023          |



## Perth & Kinross Council

22 January 2024

### CORPORATE ASSET MANAGEMENT FRAMEWORK

Report by the Director (Strategy, People & Resources) & Executive Director  
(Communities)  
(Report No. 24/18)

#### 1. PURPOSE

- 1.1 This report introduces the Corporate Asset Management Framework (Appendix 1 to this document) as a key component of our wider Strategic Capital Investment Planning Framework.

#### 2. RECOMMENDATIONS

- 2.1 It is recommended that the Council:
- (a) approves the Corporate Asset Management Framework (Appendix 1) and its integration into Strategic Capital Investment Planning Framework.
  - (b) uses the asset information contained within the Corporate Asset Management Plan to assist in setting future budgets.
  - (c) approves the establishment of a Strategic Investment Advisory Group (Members and Officers) based upon Appendix 2 of this document, to further develop the Strategic Investment Planning processes.

#### 3. STRUCTURE OF THE REPORT

- 3.1 This report is structured over the following sections: -

Section 4: Background  
Section 5: Proposals  
Section 6: Conclusion  
Appendix

#### 4. BACKGROUND

- 4.1 The Council's vision is for '**a Perth and Kinross where everyone can live life well, free from poverty and inequality**'. There are significant and increasingly complex challenges, such as the cost-of-living crisis, recovery from the pandemic, global inflation and increasing levels of poverty. Alongside this, demands for services are increasing while simultaneously facing

reductions in the resources we have to meet these demands. All of this will mean difficult decisions on where we commit our resources and may require investment or disinvestment in some areas.

- 4.2 In October 2021, the Council approved the Strategic Capital Investment Planning Framework (Report 21/180 refers) aimed at facilitating a cohesive and flexible approach to investment planning and resourcing. A major component is the Investment Blueprint which has a key principle of supporting **'the delivery of sustainable public services through effective management of our assets'**, which can be achieved through a corporate asset management approach.
- 4.3 Our corporate asset management mission is **'to maximise the value of our physical assets and infrastructure and use them effectively, to realise our vision and deliver our strategic priorities.'** This report introduces the Council's Corporate Asset Management Framework, based on this approach.
- 4.4 This Framework comprises a Corporate Asset Management Policy, Strategy and Plan and incorporates the 5 asset streams:
- Community Greenspace
  - Fleet
  - ICT
  - Property
  - Roads

The Framework is detailed in the table below:

|                                                |                                                                                                                                                                                                                                                                                                                                      |
|------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Corporate Asset Management Policy and Strategy | This describes our overarching strategic policy, principles and corporate approach to how we will manage our assets to deliver our corporate priorities.                                                                                                                                                                             |
| Corporate Asset Management Plan                | This shows the entirety and value of our assets together with their annual cost. It identifies the developments required to facilitate the corporate asset management approach to investment decision making in line with the Investment Blueprint principle, allowing investment to be based on the Council's corporate priorities. |
| Stream Asset Management Plans                  | These describe how individual asset streams adhere to the Corporate Asset Management policy and strategy, and how the asset challenge will be delivered: advising on ongoing investment requirements. The plans also summarise the 30 Year investment requirements based upon life cycle planning for our existing asset base.       |

4.5 The Housing Revenue Account (HRA) operates its own Asset Management Framework, which will be incorporated into the Corporate Asset Management (CAM) Framework.

## 5. PROPOSALS

5.1 It is proposed that our approach to the management of our assets will be aligned with the Council's Investment Blueprint and Financial Strategy. In particular, our approach to corporate asset management is underpinned by the following principles:

- we maximise the public value of our physical assets
- we only have/keep and invest in the physical assets that we need to support effective service delivery
- our approach to asset management helps mitigate the impact of climate change
- our approach to asset management helps promote inclusive economic growth
- our approach to asset management helps promote equality and fairness through service design and delivery
- our approach to asset management helps promote and enhance digital inclusion

5.2 A key component of the Framework is the introduction of the Asset Challenge. This challenge provides a measurable and comparable overview across all asset streams giving an evidence base to support more informed and risk aware investment decision making. Any investment or disinvestment will be subject to this challenge.

5.3 A key output of the Framework is the 30 Year Investment Plan. This is based on utilising the asset data held in our electronic systems to develop 30-year lifecycle investment plans for our existing asset base and existing levels of service. As such, the investment plans will form the basis for long term strategic investment planning. In particular, this will balance the needs of our asset base with our future aspirations, in the context of matching Corporate priorities with service delivery, while recognising communities needs, climate change and affordability.

5.4 It is proposed that the Asset Stream Plans should be treated as iterative documents, in particular, the 30 year investment plans represent our current position. These will be updated on an annual basis to incorporate additional investment and disinvestment decisions.

5.5 A key consequence is that the 30 year plans will underpin the annual budget process.

5.6 As part of the Framework, asset status reports will be prepared on an annual basis.

5.7 A key part of our long-term strategic investment planning will be balancing the needs of our asset base with our future aspirations. It is essential that Elected Members are at the centre of this and, to this end, it is recommended that a Strategic Investment Advisory Group is formed, consisting of members and officers. This will be a visionary group looking to the long-term needs of our citizens and communities, it will be innovative, and legacy focussed, making investment recommendations at a strategic level. The terms of reference for this group are attached as Appendix 2 to this document.

## 6. CONCLUSION

6.1 Approving the recommendations of this report, will allow our investment decisions to be directed towards delivering our corporate asset management approach of maximising the value of our physical assets and infrastructure and using them effectively, to deliver our strategic priorities.

6.2 Through the establishment of a Strategic Investment Advisory Group, Elected Members will be at the heart of our strategic investment planning, providing the opportunity for direct involvement in ensuring the long term sustainability of our physical and infrastructure assets.

### Authors

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|-------------------|----------------------------------------|----------------------------------------------------------------------------------------------------|
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### Approved

| Name           | Designation                                   | Date             |
|----------------|-----------------------------------------------|------------------|
| Barbara Renton | Executive Director (Communities)              | 15 November 2023 |
| Clare Mailer   | Director (Strategy, People & Resources)       | 15 November 2023 |
| Fraser Crofts  | Strategic Lead – Environment & Infrastructure | 15 November 2023 |
| Scott Walker   | Strategic Lead – Finance & Business Support   | 15 November 2023 |

### APPENDICES: -

- Appendix 1 – Corporate Asset Management Framework
- Appendix 2 – Terms of Reference for Strategic Investment Advisory Group

## 1. IMPLICATIONS, ASSESSMENTS, CONSULTATION AND COMMUNICATION

| <b>Strategic Implications</b>                       | <b>Yes / None</b> |
|-----------------------------------------------------|-------------------|
| Community Plan / Single Outcome Agreement           | <b>None</b>       |
| Corporate Plan                                      | <b>Yes</b>        |
| <b>Resource Implications</b>                        |                   |
| Financial                                           | <b>None</b>       |
| Workforce                                           | <b>None</b>       |
| Asset Management (land, property, IST)              | <b>None</b>       |
| <b>Assessments</b>                                  |                   |
| Equality Impact Assessment                          | <b>Yes</b>        |
| Strategic Environmental Assessment                  | <b>Yes</b>        |
| Sustainability (community, economic, environmental) | <b>Yes</b>        |
| Legal and Governance                                | <b>None</b>       |
| Risk                                                | <b>None</b>       |
| <b>Consultation</b>                                 |                   |
| Internal                                            | <b>Yes</b>        |
| External                                            | <b>None</b>       |
| <b>Communication</b>                                |                   |
| Communications Plan                                 | <b>None</b>       |

### 1. Strategic Implications

#### Corporate Plan

1.1 The Council's Corporate Plan 2022 – 2027 lays out seven outcome focussed strategic objectives which provide clear strategic direction, inform decisions at a corporate and service level and shape resources allocation. They are as follows:

- Tackling poverty
- Tackling climate change and supporting sustainable places
- Growing a sustainable and inclusive local economy
- Enabling our children and young people to achieve their full potential
- Protecting and caring for our most vulnerable people
- Supporting and promoting physical and mental wellbeing
- Placing communities at the heart of how we work

1.2 This report relates to all objectives.

## 2. Resource Implications

### Financial

- 2.1 There are no direct financial implications arising from this report other than those reported within the body of the main report.

## 3. Assessments

### Equality Impact Assessment

- 3.1 Under the Equality Act 2010, the Council is required to eliminate discrimination, advance equality of opportunity, and foster good relations between equality groups. Carrying out Equality Impact Assessments for plans and policies allows the Council to demonstrate that it is meeting these duties.
- 3.2 The information contained within this report has been considered under the Corporate Equalities Impact Assessment process ("EqIA") and has been assessed as **not relevant** for the purposes of EqIA.

### Strategic Environmental Assessment

- 3.3 The Environmental Assessment (Scotland) Act 2005 places a duty on the Council to identify and assess the environmental consequences of its proposals.
- 3.4 The information contained within this report has been considered under the Act. However, no action is required as the Act does not apply to the matters presented in this report.

### Sustainability

- 3.5 Under the provisions of the Local Government in Scotland Act 2003 the Council has to discharge its duties in a way which contributes to the achievement of sustainable development. In terms of the Climate Change Act 2008, the Council has a general duty to demonstrate its commitment to sustainability and the community, and the environmental and economic impact of its actions.
- 3.6 The information contained within this report has been considered under the Act. However, no action is required as the Act does not apply to the matters presented in this report.

## 4. Consultation

### Internal

- 4.1 The Executive Leadership Team has been consulted in the preparation of this report.

## **2. BACKGROUND PAPERS**

- 2.1 No background papers, as defined by Section 50D of the Local Government (Scotland) Act 1973, other than any containing confidential or exempt information, were relied on to any material extent in preparing the above report.





Appendix 1



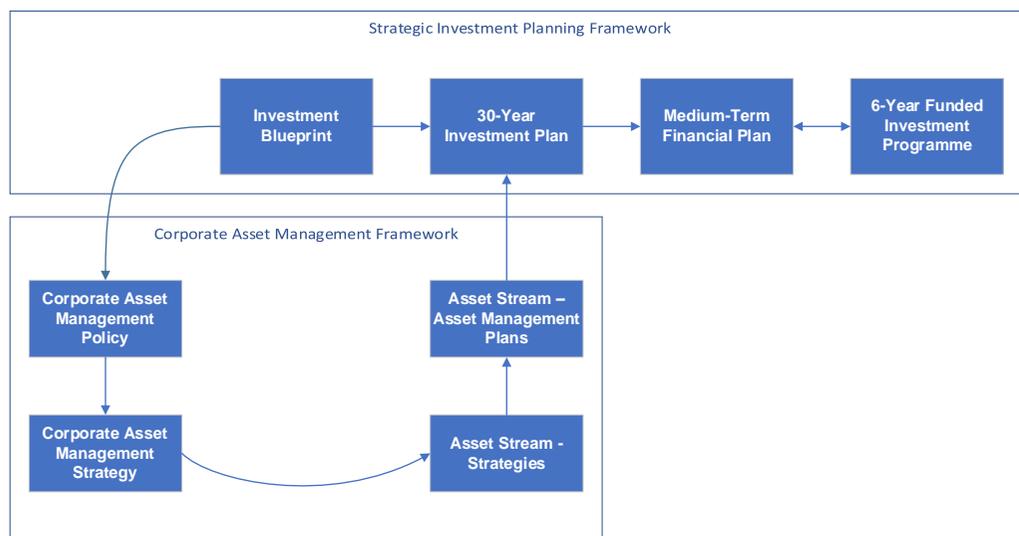
# Corporate Asset Management 2023

# Corporate Asset Management Policy

Perth and Kinross Council relies on a large, complex and diverse portfolio of physical assets to deliver a broad range of services to our communities. It is important that these assets continue to meet acceptable levels of performance and support the delivery of services in a sustainable manner. The scale and criticality of our asset streams requires a systematic approach to total lifecycle asset management. This will inform investment decision-making; help protect services and ensure that we optimise the value of our assets to achieve our strategic aims and operational priorities.

## Context

The Investment Blueprint was approved by Council on 06 October 2021 (Report no: 91-126 refers). This Policy forms part of the wider Corporate Asset Management Framework and contributes to the Council’s Strategic Investment Planning process as shown below:



The Corporate Asset Management Policy provides the framework to develop a holistic asset management approach that will ensure long-term asset sustainability, demonstrate a commitment to good stewardship of the Council’s physical assets

infrastructure assets and support improved accountability and transparency to the community through the adoption of appropriate asset management practices.

## Scope

This policy applies to the lifecycle management activities of physical assets within the ownership and/or control of the Council in the following categories (“asset streams”):

-

- Property Estate
- Roads and Associated Infrastructure
- Fleet and Mechanical Equipment
- Greenspace
- Information Technologies

The Policy Principles may also be applied to third party assets which the Council has a significant interest in.

## Purpose and objectives

The purpose of this policy is to guide the development and implementation of the Council’s Corporate Asset Management Framework and Asset Stream Management Plans. It is intended to promote a consistent and integrated approach to asset management across the Council to ensure the effective management of the Council’s asset streams; facilitate transparent and data driven investment planning and decision-making; and support the delivery of sustainable services now and in the future. It defines the key principles to be applied across all asset streams within scope and plays a key role in creating an overall “Line of Sight” between our asset interventions and investment decisions and the Council’s corporate vision and strategic priorities.

CAM Policy objectives;-

- Physical assets are managed strategically as a corporate resource
- Physical assets support efficient and effective service delivery and achievement of the Council’s strategic priorities
- A consistent and structured approach to the identification, recording and management of physical assets within and across asset streams
- Physical assets are safe and comply with legislation and other regulatory requirements
- Physical assets are economically and environmentally sustainable
- Risk is managed in line with our approved strategic risk management framework
- Quality data to inform investment /dis-investment decisions

### Corporate Asset Management Principles

Our approach to the management of our asset streams will be aligned with the Council’s Investment Blueprint and Financial Strategy. In particular, our approach to corporate asset management is underpinned by the following principles.

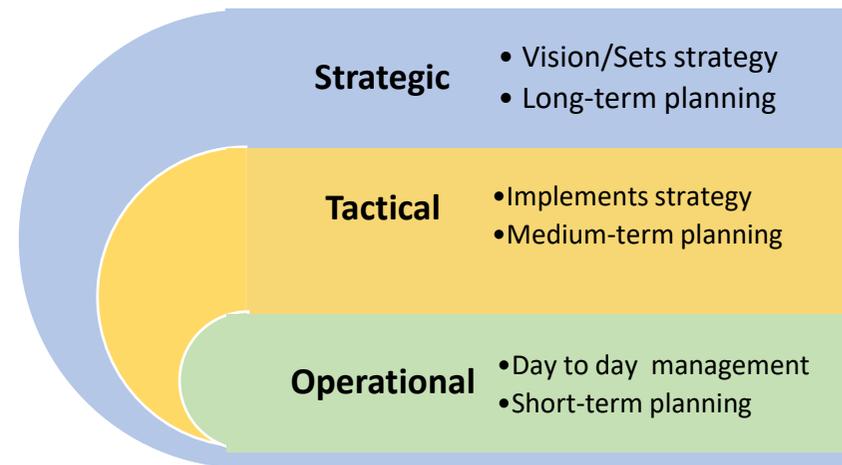
- We maximise the public value of our physical assets
- We only have/keep and invest in the physical assets that we need to support effective service delivery
- Our approach to asset management helps mitigate the impact of climate change
- Our approach to asset management helps promote inclusive economic growth
- Our approach to asset management helps promote equality and fairness through service design and delivery
- Our approach to asset management helps promote and enhance digital inclusion

### Corporate Asset Management Framework

Effective asset management requires planning and decision-making at different levels, with clear lines of accountability and responsibility within each, and cohesion across all three. The three levels are illustrated below. To support informed and risk-based decision-making at each level and to ensure a cohesive and consistent

approach across the organisation, a supporting framework has been developed comprising:

- CAM Policy
- CAM Strategy
- CAM Plan
- Asset Stream Strategies
- Asset stream Plans



### Policy Governance

The governance framework for the process of Corporate Asset Management is set out in the CAM Strategy.

This CAM Policy will be reviewed every 3 years or sooner if required in response to legislative, regulatory or policy changes. The review will be overseen by the Policy and Governance Group. Any material changes in terms of policy direction will be referred to Finance & Resources Committee for approval, as required.

## Corporate Asset Management Strategy

This Corporate Asset Management Strategy sets out our approach to asset management within Perth and Kinross Council to ensure the effective management of the Council's physical assets (Figure 1). The strategic approach is underpinned by the principles set out in the Investment Blueprint and the Council's Corporate Asset Management (CAM) Policy and informed by "A Guide to Local Authority and Public Sector Asset Management," published by Chartered Institute of Public Finance and Accountancy (CIPFA).

The Perth and Kinross Corporate Plan sets out the strategic priorities of the Council and a vision for Perth and Kinross where everyone lives life well, free from poverty and inequalities.

Our physical assets are integral to the design and delivery of sustainable services. Effective asset management is therefore key to ensuring that we have the right assets, in the right place, at the right time, to provide the service solutions that our communities need now and in the future, if they are to live life well.

Our Corporate Asset Management Mission:

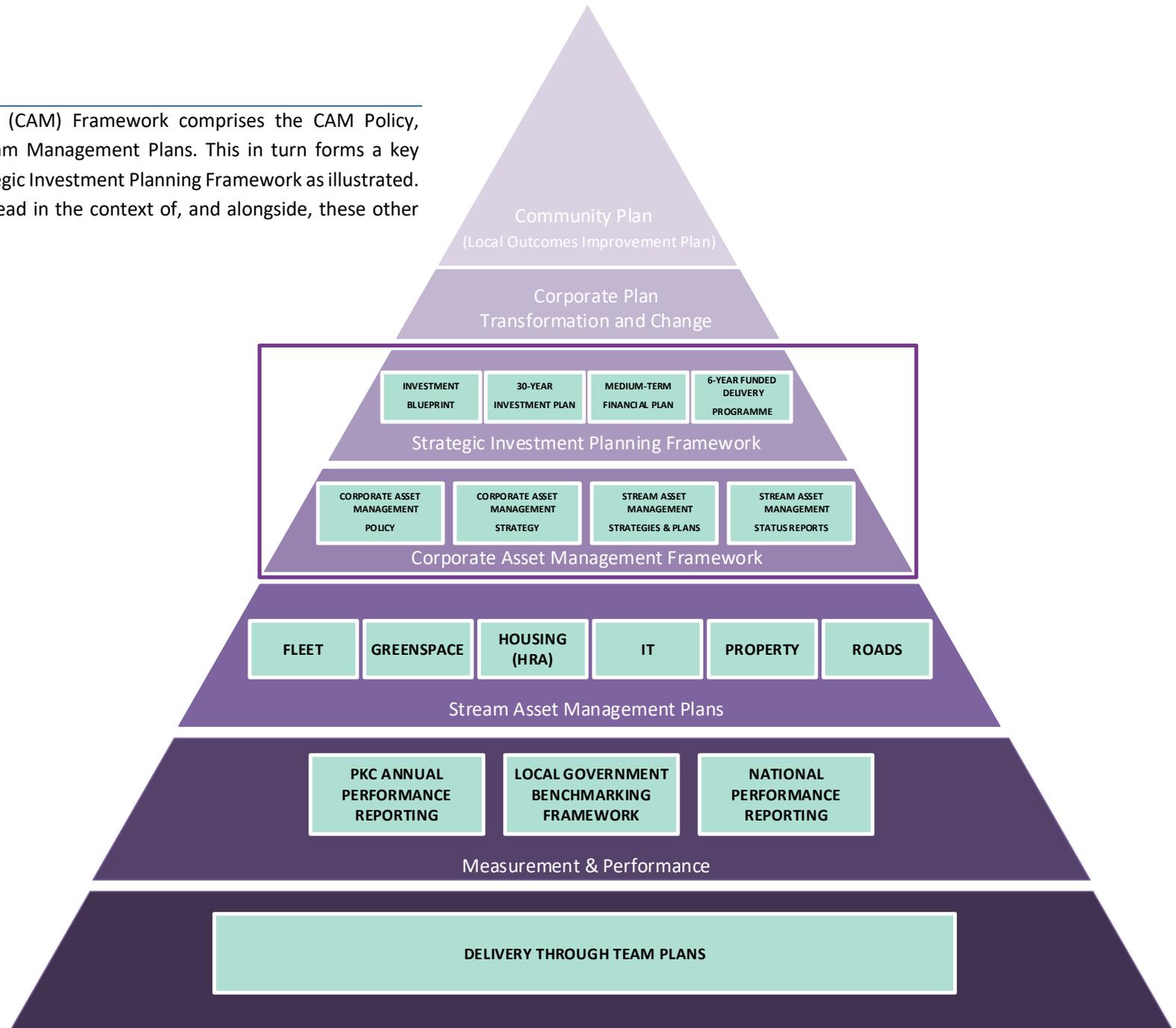
**To maximise the value of our physical assets and infrastructure and use them effectively, to realise our vision and deliver our strategic priorities.**



Figure 1.

## Strategy Development

The Corporate Asset Management (CAM) Framework comprises the CAM Policy, Strategy and respective Asset Stream Management Plans. This in turn forms a key element of the Council's wider Strategic Investment Planning Framework as illustrated. This document therefore must be read in the context of, and alongside, these other key strategic documents.



## Corporate Asset Management: Purpose, Principles & Performance

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The purpose of the CAM framework is to provide an agreed approach to the management of our physical assets across their lifecycle to ensure that they deliver the greatest value and facilitate informed investment decision-making.

To ensure a consistent and cohesive approach to asset management is taken, the following policy objectives and principles have been agreed and should therefore underpin planning and decision-making in relation to all asset streams within scope.

### CAM Policy Objectives:

- Physical assets are managed strategically as a corporate resource
- Physical assets support efficient and effective service delivery and achievement of the Council's strategic priorities
- A consistent and structured approach to the identification, recording and management of physical assets within and across asset streams
- Physical assets are safe and comply with legislation and other regulatory requirements
- Physical assets are economically and environmentally sustainable
- Risk is managed in line with our approved strategic risk management framework
- Quality data to inform investment /dis-investment decisions

### CAM Principles:

- We maximise the public value of our physical assets
- We only have/keep and invest in the physical assets that we need to support effective service delivery

- Our approach to asset management helps mitigate the impact of climate change
- Our approach to asset management helps promote inclusive economic growth
- Our approach to asset management helps promote equality and fairness through service design and delivery
- Our approach to asset management helps promote and enhance digital inclusion

## Corporate Asset Management Planning

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There are three levels of asset management planning and decision-making: Strategic, Tactical and Operational.

**Strategic:** takes a long term view; provides the strategic direction, determines the strategic priorities and provides investment to ensure that we have a sustainable asset base to deliver the services that our communities will need in the future

**Tactical:** takes a medium term view; implements the corporate asset management strategy; takes a holistic view of the asset base data to ensure strategic alignment in the short to medium term and to identify gaps, risks and opportunities to optimize the value of the asset base and inform long term planning and investment decisions

**Operational:** takes a current view; ensures assets are safe, compliant and capable of delivering the agreed standard of service. Monitors and assesses cost, condition, use to determine value and inform tactical decision-making and longer term planning.

The **Corporate Asset Management Plan** is a **tactical** plan setting out how assets will be managed in accordance with the CAM Framework. This tactical plan is shaped and informs individual asset stream **operational** strategies and plans and together will form a dynamic 30 year **strategic** Investment Plan for the organisation.

### Asset Stream Plans (Operational)

The asset streams within the scope of this CAM Framework are:-

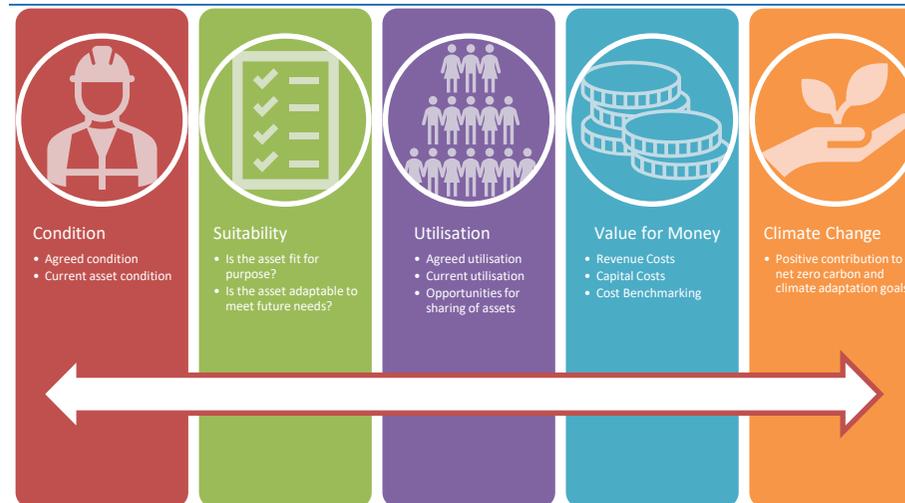
- Property Estate
- Roads and Associated Infrastructure
- Fleet and Mechanical Equipment
- Greenspace
- Information Technologies

Each asset stream shall have its own strategy and plan which will set out the nature of the assets held and the baseline indicative costs of maintaining the assets over their lifecycle (or 30 years in terms of the period for the Investment Blueprint) based on the current level of service.

To better inform tactical and strategic decision-making the value of the assets will be challenged under 5 criteria (or pillars) to obtain the necessary data.

The challenge approach takes into account the principles of the CAM Framework and will be applied across each asset stream, ensuring a cohesive strategic approach to the management of our physical assets. It also enables transparent and data driven decisions to be taken in a consistent and structured way.

### Asset Challenge Process: The 5 Pillar Approach



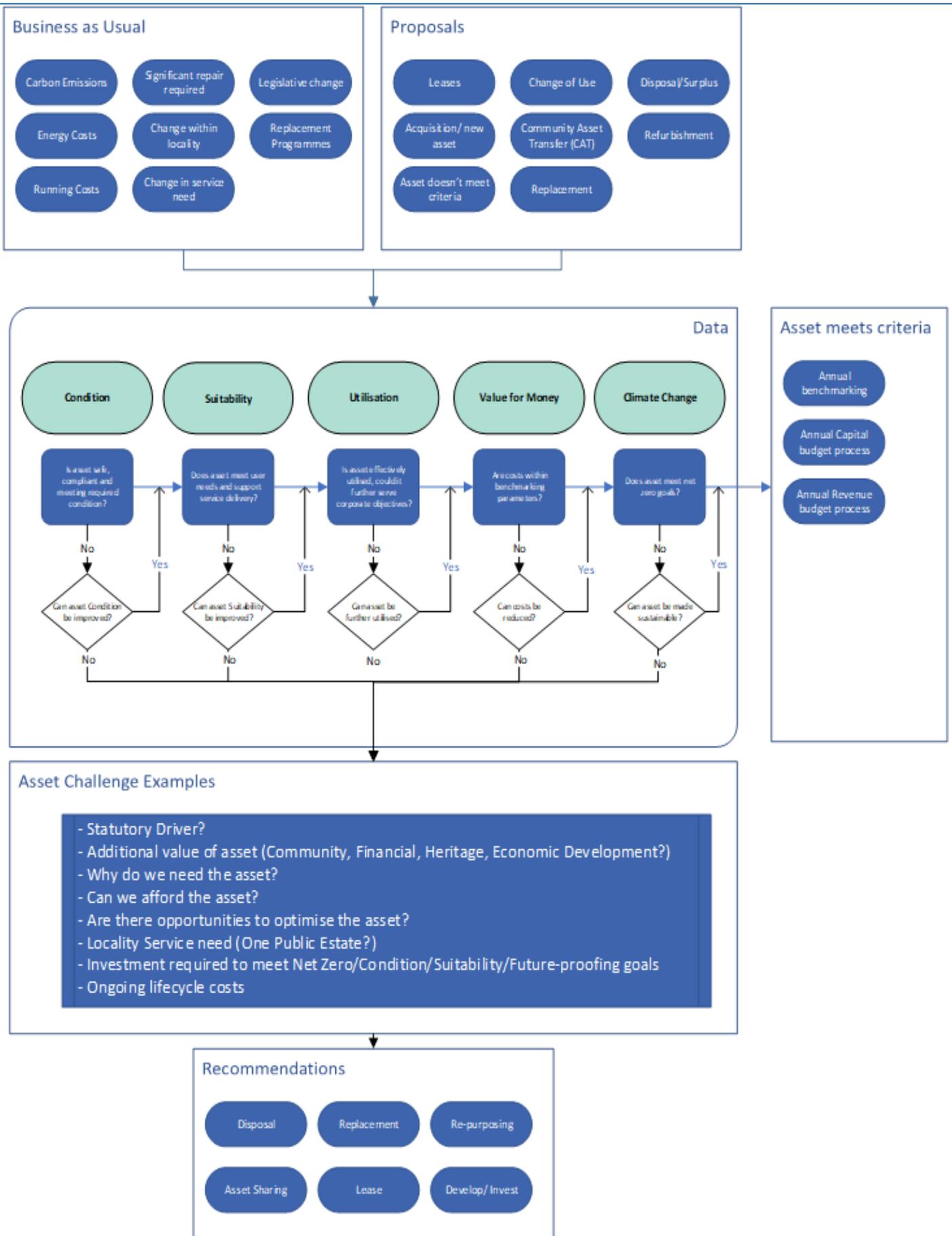
Reviewing assets against these pillars will provide a measurable and comparable overview across all asset streams, providing an evidence base to support more informed and risk aware investment decision-making.

The process itself is derived from the CIPFA model set out in its *“Guide to Local Authority and Public Sector Asset Management”* and the data derived from these challenge exercises will help inform:

- annual benchmarking
- annual capital budget setting
- annual revenue budget setting

The asset challenge process will be applied to individual stream asset management strategies, with the questions being adapted for different types of assets. The model for the asset management challenge and how it will be applied in practice is illustrated, in detail, below at Figure 4.

# Asset Challenge Model



## Corporate Asset Management: Governance and Decision-making

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Our physical assets play a key role in the Council's ability to deliver both its strategic and operational priorities.

The strategic vision for the Council is for **a Perth and Kinross where everyone lives life well, free from poverty and inequalities**. Within the Corporate Plan, elected Members have set out seven key strategic priorities in response to the macroeconomic, social and environment issues affecting our communities ;

- Tackling poverty
- Tackling climate change and supporting sustainable places
- Developing a resilient, stronger and greener local economy
- Enabling our children and young people to achieve their full potential
- Protecting and caring for our most vulnerable people
- Supporting and promoting physical and mental wellbeing
- Working in partnership with communities

The Council also has a statutory responsibility to provide a broad and complex range of operational services, many of which are highly regulated and subject to external scrutiny and audit. Responsibility for the delivery of operational services sits with the Chief Executive and officers.

Need within our communities is growing and becoming ever more complex resulting in an increasing demand for operational services and other forms of support and assistance. As resources across local government and the wider public sector become more stretched, it is crucial that we make the best use of our existing assets and ensure that our investment decision-making is risk-based, data driven and transparent.

Asset management is a key part of strategic planning; connecting decisions about the Council's priorities and needs, the deployment of its assets and future investment requirements. To be effective, it requires a holistic approach to ensure that we have the right assets, in the right place at the right time.

The governance framework for corporate asset management aligns with the investment decision-making framework set out in the Council's approved Strategic Capital Investment Planning Framework. To ensure assets are fit for purpose and that any investment is directed where it is most needed, a more collective approach

to asset management and investment is required. This new approach will be facilitated through a new Member Officer Working Group (MOWG) which will be established as a standing group. The new MOWG will complement and work alongside the existing officer board to ensure a shared understanding of the value, risks, gaps and opportunities within the asset base.

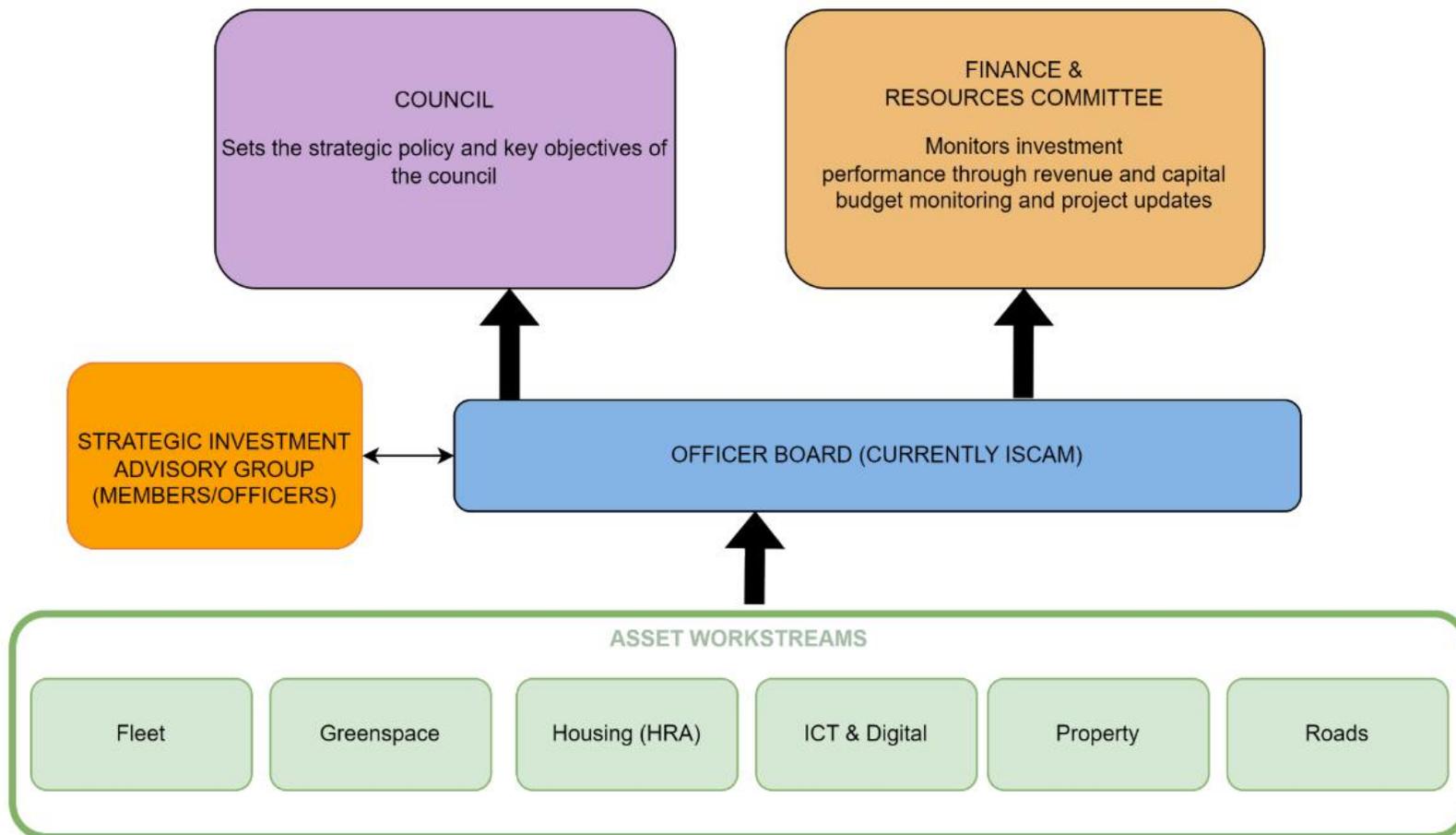
The officer board will be responsible for ensuring the implementation of the CAM strategy and will oversee the delivery of the Asset Stream Plans and monitor risk and performance. The Board will also provide tactical oversight of the Council's approved 6 year Funded Delivery Plan and sharing any identified strategic risks in terms of project or programme delivery, with the MOWG.

The MOWG in turn will oversee the development of the rolling 30 Year Investment Plan. It is important that this high level, long term plan is not simply an aspirational wishlist. Given the finite resources available, the purpose of the plan is to ensure that we are targeting investment where it is most needed. This requires an understanding of the asset streams from a whole life cycle perspective in terms of:

- purpose and alignment with strategic priorities; and
- value to both the organisation and to our communities (cost, benefit, risk and impact)

The purpose of the asset challenge process is to give the organisation that understanding and insight to better inform investment decision-making. The MOWG will oversee the asset challenge process and use the data gathered to assess and prioritise investment requests and project proposals with a view to supporting evidence based budget discussions.

Roles, responsibilities and accountabilities for the MOWG and the officer Board will be developed and set out in respective Terms of Reference.





# Corporate Asset Management Plan 2023



## Introduction

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### Vision:

Our Corporate Plan sets out the vision for **a Perth and Kinross where everyone can live life well, free from poverty and inequalities** and our key priorities for the next five years. It also reflects our commitment to better engage people and communities in strategic planning discussions to help shape the design and delivery of services now and in the future.

### Mission:

Asset management is a key part of strategic planning; connecting decisions about the Council's priorities and needs, the deployment of its assets and future investment requirements. To be effective, it requires a holistic approach to ensure that we have the right assets, in the right place at the right time.

Our Corporate Asset Management "Mission" is therefore:

**to maximise the value of our physical assets and infrastructure and use them effectively, to realise our vision and deliver our strategic priorities.**

### Strategic Planning and Investment Framework:

Asset management is also an integral element of the Council's wider Strategic Planning and Investment Framework which comprises:

- **Investment Blueprint** - describing the strategic rationale and key drivers which will shape our investment decisions.

- **30 Year Investment Plan** – the investment plan which outlines the Council's investment requirements to deliver its strategic objectives over a rolling 30-year period.
- **Medium Term Financial Plan** – describing the direction of travel for the Council's financial management with further detail and options for managing

the various challenges being developed as part of the Revenue and Capital Budget process.

- **6 Year Funded Capital Delivery Programme** – the funded delivery programme which details the delivery of individual projects and programmes.

The Corporate Asset Management (CAM) Mission is in line with the purpose and principles of the approved Investment Blueprint which states:

***'Our investments will support the delivery of sustainable public services through effective management of our assets'.***

### Corporate Asset Management Approach:

To ensure that we have the right assets in place to deliver the services that our communities need now, and in the future, we need to:

1. understand what assets are required to deliver the services our communities need;
2. understand the totality, suitability and condition of our asset base; and
3. assess this against our future requirements as determined by the longer-term strategic vision for our communities and our corporate priorities.

This requires the organisation to take a holistic view of our asset base and a systematic and cohesive approach asset management activities;

- Asset acquisition
- Asset identification and classification

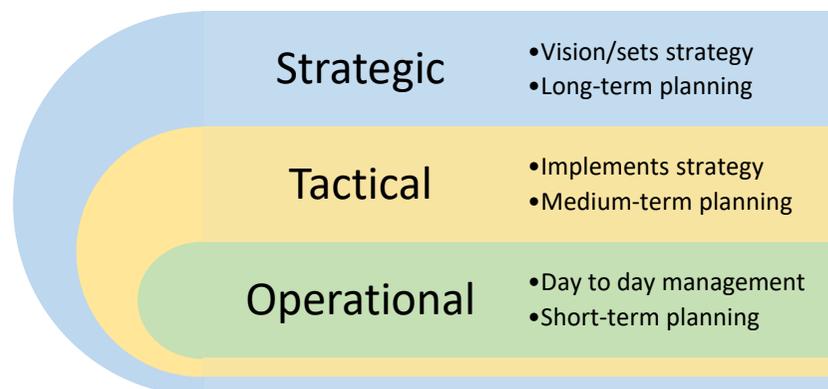
- Asset tracking and inventory
- Asset compliance and reporting
- Asset maintenance and repair
- Asset disposal and retirement

To enable us to make informed and risk-based decision as regards future investment or disinvestment, we also need to consider our asset base from a more strategic perspective, in terms of: -

- **purpose:** alignment with strategic priorities
- **whole life cycle:** the entire asset life cycle should be considered through acquisition, operation and management to disposal, optimising use throughout
- **value:** our assets should improve and/or increase the outputs or impact of the organisation in measurable terms

### Corporate Asset Management Framework:

Effective asset management requires planning and decision-making at different levels with clear lines of accountability and responsibility within each and cohesion across all three. The three levels are illustrated below:



To support informed and risk-based decision -making at each level and to ensure a systematic and structured approach across the organisation, a supporting framework has been developed comprising:

- CAM Policy
- CAM Strategy
- CAM Plan
- Asset Stream Strategies
- Asset Stream Plans

The Asset Streams within scope are:

- Property
- Roads and associated infrastructure
- Fleet and mechanical equipment
- Greenspace
- Information Communication Technology & Digital

The purpose of the CAM Framework is to manage our physical assets across their lifecycle to deliver the greatest value and facilitate informed investment decision-making. It ensures that:

- our physical assets are managed strategically as a corporate resource
- we take a consistent and structured approach to the identification, recording and management of our physical assets
- our physical assets support efficient and effective service delivery and achievement of the Council's strategic priorities
- our physical assets are safe and comply with legislation and other regulatory requirements
- our physical assets are economically and environmentally sustainable
- we manage risk in line with our strategic risk management framework
- we have objective evidence to inform investment/dis-investment decisions

## Corporate Asset Management Plan (CAM Plan)

The purpose of the CAM Plan is to ensure that our asset base is managed in accordance with the CAM Policy and Strategy. It sits over the respective Asset Stream Plans and draws them together to provide a strategic view of the asset base in terms of value, cost, risk and performance across lifecycle.

It is underpinned by the principles set out within the CAM strategy:

- We maximise the public value of our physical assets
- We only have/keep the physical assets that we need to support effective service delivery
- Our approach to asset management helps mitigate the impact of climate change
- Our approach to asset management helps promote inclusive economic growth
- Our approach to asset management helps promote equality and fairness through service design and delivery
- Our approach to asset management helps promote and enhance digital inclusion

The Asset Stream Plans provides baseline data in relation to the assets that we hold and the anticipated lifecycle costs over 30 years (ie, the period of the 6-year Funded Delivery Plan plus the projected costs for a further 24 years excluding inflation and, as yet, unfunded). Drawn together under the CAM Plan they constitute our first high level, corporate **30 Year Investment Plan** based upon the life-cycle investment requirements of our existing asset base to deliver the agreed levels of service, as is.

The CAM Plan is the tactical link between strategic planning and investment and the operational management of our assets which will ensure that our asset base is aligned with the Council's vision and agreed priorities.

Our approved Financial Strategy requires us to direct resources where they are most needed and to take a planned and sustainable approach to capital investment. To

make informed and risk-based investment decisions as regards our physical assets therefore, we need quality data to better understand: -

- what services and support our communities need now
- what assets are required to deliver that level of service
- the totality, suitability and condition of our asset base; and
- future requirements as determined by the longer-term strategic vision for our communities and our corporate priorities.

Building a more strategic profile of our asset base will be an iterative process informed by constant assessment and analysis against the asset challenge pillars set out below:



The asset challenge process will provide us with more robust and coherent data across each of the asset streams. The data will be assessed and analysed to identify any risks, issues or gaps within the existing asset base in terms of their ability to support the efficient delivery of services. It should also inform future service design and delivery.

The CAM Plan provides a high overview of current assets within scope and associated capital and revenue expenditure ([Appendix 1](#))

As a driver for the [30-year Investment Plan](#), the CAM Plan will therefore be a dynamic, rolling plan, capable of responding to changing needs within our communities and emerging risks and opportunities in relation to our asset base. It will be updated continually and presented on an annual basis to inform capital budget considerations.

### 30 Year Investment Plan

A key element of our strategic investment planning approach is our 30 Year Investment Plan in respect of our physical assets. This comprises a 6 Year funded delivery programme and a 24 Year unfunded plan.

The 6 Year funded delivery programme is managed through our existing capital investment governance structure. It is developed through identification of investment proposals which are then subject to our approved project management governance - strategic business case; outline business case; and full business case.

Our approved Investment Blueprint provides for the 5 Case Model approach to be applied whereby at each stage of the business case, the proposal is considered from five interdependent perspectives, namely:

- Strategic
- Economic
- Commercial
- Financial
- Management

The approach is designed to ensure that our investment decisions are strategically aligned with our corporate priorities and deliver best value.

The 24 Year unfunded plan element (presently 30/31 – 53/54) is a new concept. This first iteration of the plan has been developed based on lifecycle planning for our individual asset streams to deliver the current agreed level of service. This is set out in detail in the respective asset stream strategies and plans.

Based on that assessment, a high-level summary of the current future investment requirements is shown in the table below:

| Asset Stream                                    | 24 Year Capital Projections (£,000,000) |
|-------------------------------------------------|-----------------------------------------|
| Community Greenspace                            | £99M                                    |
| Fleet                                           | £72M                                    |
| Information, Communication Technology & Digital | £167M                                   |
| Property                                        | £1,759M                                 |
| Roads                                           | £497M                                   |
|                                                 | £2,594M                                 |

The 24 Year element of the 30-year plan is dynamic, it will be updated on at least an annual basis with Year 1 of the unfunded 24 Year Plan becoming the provisional Year 6 of the funded programme and a new Year 24 will then be added to the unfunded plan.

Additional investment requirements outwith our normal lifecycle will be incorporated into future versions of the overall 30 Year Plan as and when they are identified.

Governance arrangements in relation to oversight and management of the 30 year Investment Plan are set out in the CAM Strategy.

# Appendix 1

## Corporate Assets Overview

The table below provides a high-level summary of our current asset base:

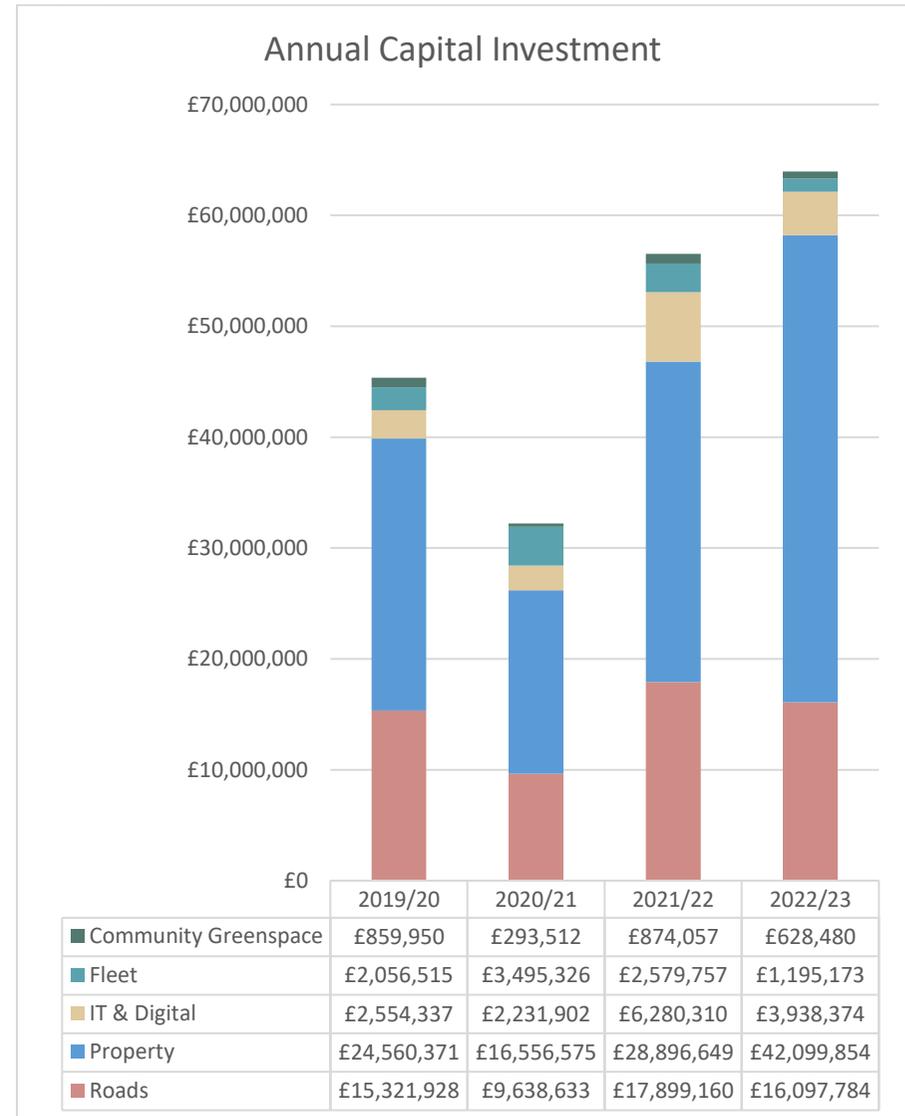
| Asset Stream                                               | Detail                                                |
|------------------------------------------------------------|-------------------------------------------------------|
| Community Greenspace                                       | 1,614 greenspace sites                                |
| Fleet                                                      | 2,380 items of Fleet & Mechanical equipment           |
| Information and Communication Technology (ICT) and Digital | 23,025 items of hardware, and all corporate software  |
| Property                                                   | 968 sites within the property estate                  |
| Roads                                                      | 1,546 miles of carriageway and related infrastructure |

The corporate asset information register (AIRS) attaches the following unaudited net book valuation to our assets:

| Asset Stream                                               | Net Book Valuation |
|------------------------------------------------------------|--------------------|
| Community Greenspace                                       | £7,591,001         |
| Fleet                                                      | £22,230,005        |
| Information and Communication Technology (ICT) and Digital | £12,104,470.       |
| Property                                                   | £702,016,000       |
| Roads                                                      | £3,660,211,000     |

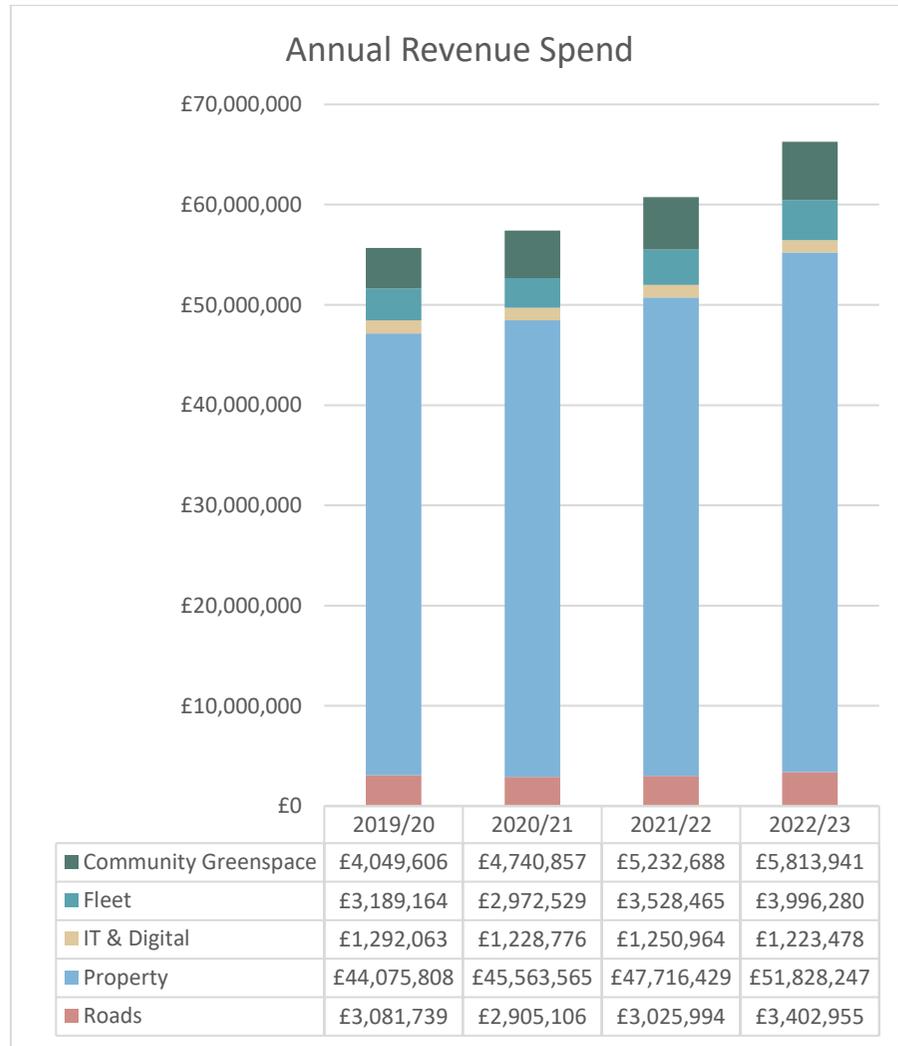
## Capital

Capital expenditure over the last four years on our asset base is illustrated in the chart below, total capital expenditure on our existing asset base was pproximately £200M:



## Revenue

The bulk of revenue spend on our asset base relates to running costs and maintenance costs. Over the last 4 years the total revenue spend on our existing asset base was approximately £240M. This spend is illustrated in the chart below:



2023-2029



# Community Greenspace Asset Management Strategy

## Strategy Introduction

---

Greenspace is a diverse asset base that is appreciated and utilised daily by residents, businesses and visitors alike providing unique health, social, economic and ecological benefits:

- Attractive, well used, free, outdoor facilities for all and offering diverse uses
- Active community involvement and engagement with voluntary groups, promoting both civic pride and a sense of place.
- Accessible events for local people, which also cater to ecological tourism
- Provision of health-encouraging facilities, for both physical and mental health
- Habitats for flora and fauna and preventing loss of biodiversity

Overall, greenspace plays a critical role in supporting healthy, vibrant and sustainable communities.

Since the last Community Greenspace Asset Management Plan was published, the environment in which the Council operates has changed considerably, creating a need for focus on carbon neutrality and affordability and utilisation. This presents challenges and opportunities to drive change and examine how the Council currently manages, invests in and utilises our greenspace assets.

This strategy and related plan adhere to the overarching approach articulated within the **Corporate Asset Management Framework (CAMF)**; in terms of Community Greenspace, this consists of three interrelated sections:

- Corporate Asset Management Policy & Strategy
- Community Greenspace Asset Management Strategy
- Community Greenspace Asset Management Plan

The CAMF provides an organisational approach to asset management via corporate adherence to the following asset management principles, which are informed by those approved by the Strategic Planning and Resources Committee in November 2018:

- All assets are considered as being corporate
- Assets will be identified and accurately recorded and managed via appropriate systems, to ensure they are as accessible as possible to all services/service users
- Assets will be safe, statutorily compliant, and economically and environmentally sustainable
- Where appropriate, benchmarks will be established and assets reviewed against these to aid investment planning
- The utilisation of assets will be maximised, meet communities' needs and support future service delivery

This document is supported by existing strategies and policies:

- Perth & Kinross Council Grassland Management 2023
- Perth & Kinross Council Play Strategy 2006 (currently under review)
- Perth & Kinross Council Play Area Rationalisation Policy 2012
- Perth & Kinross Council Tree Management Policy 2014
- Perth & Kinross Council Core Paths Implementation Plan 2012
- Perth & Kinross Council Food Growing Strategy 2021
- Perth & Kinross Council Leisure Needs Analysis 2012
- Perth & Kinross Council Outdoor Sports Policy (draft)
- Perth & Kinross Council Grounds Maintenance Review 2013
- Perth & Kinross Council Forest Plan 2015-2035
- Perth & Kinross Cemetery Strategy 2016
- National Standards of Community Engagement
- Local Biodiversity Action Plan
- Mobility Strategy (Draft)
- Climate Action Plan

The provision and management of the Council's greenspace assets, reflects the guidance and advice outlined in the Scottish Governments' Planning Advice Note 65 (PAN 65).

There is a “golden thread” that connects this Community Greenspace Asset Management Strategy to the overarching Community Plan (Local Outcome Improvement Plan) vision of “A Perth and Kinross where everyone can live life well, free from poverty inequality”

This thread is illustrated below:

## Local Outcome Improvement Plan (LOIP)

*A Perth and Kinross where everyone can live life well, free from poverty inequality*

Tackling poverty

In partnership with communities

Physical and mental wellbeing

Children and young people

Tackling climate change

Vulnerable people

Stronger and greener economy

## Financial Strategy

## Infrastructure & Investment Plan for Scotland

## Transformation & Change

## Strategic Investment Planning Framework

## Corporate Asset Management Framework

# Community Greenspace Asset Management Strategy

## Vision & Principles

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Alongside other local authorities, Perth and Kinross Council is facing challenges in maintaining and improving our greenspaces due to economic climate, aging resources, loss of biodiversity and elevated public service expectations.

To ensure well-maintained and accessible greenspace assets are suitable not only for the present but also for future generations, the Community Greenspace Asset Management Strategy aims to optimise efficiency, reliability and enhance asset management practices.

In support of this our Community Greenspace Vision is:

**“Working together to maintain, improve and promote our shared spaces for all to enjoy”**

We will achieve this via the delivery of the Community Greenspace Asset Management Strategy, which is designed to provide a coherent and structured approach to greenspace asset management and support PKC’s investment decision making.

This strategy will direct decisions relating to procurement, maintenance and replacement and lead to improved operational efficiency and enhanced service delivery.

In support of the vision, and adherence to the CAMF, four strategic principles have been established to guide decision-making:

1. Continue to collaborate with communities and volunteers to improve well-being
2. Work to maximise shared opportunities
3. Enhance sustainability and biodiversity within our Greenspace assets
4. Utilise life-cycle management and proactive maintenance

## Challenges and Actions

These Strategic Asset Management Principles adhere to the guiding principles of the Corporate Asset Management Framework and guide the Asset Management Plan:

### Principle 1: Continue to collaborate with communities and volunteers to improve well-being

#### THE CHALLENGES:

- Continuing to foster and achieve meaningful community engagement and active participation in maintaining our greenspace areas
  - Resource limitations and reduced community involvement affects delivery of projects
- Balancing the diverse requirements and expectations of our local communities and providing versatile assets that best cater to these

#### WE WILL:

- Work with relevant colleagues to address resource limitations.
- Continue to seek input from residents, asset users and community groups to understand their needs
  - Work with relevant colleagues to reinstate user surveys to gather feedback
  - Collaborate with other councils and partners to highlight successful projects and utilise the insights gained in our own development initiatives.
  - Continue to empower Community Groups via the provision of maintenance equipment and related training
- Continue to actively work with community groups to design, raise funds and deliver versatile green spaces, enhancing their utilisation and accessibility via a multi-purpose approach
- Work with colleagues to further empower communities to manage non-built green spaces
- Continue working with Tayside Health Partnership to connect health providers with Greenspace assets, enabling social prescribing

Continue to collaborate with communities and volunteers to improve well-being

## Principle 2: Work to maximise shared opportunities

Work to maximise shared opportunities

### THE CHALLENGES:

- To identify opportunities to work collaboratively with all stakeholders
- To align our different works programmes to support better collaboration
- To align our budgets to support better collaboration
- The condition of public buildings on greenspace sites

### WE WILL:

- Use the Officer Public Realm Group to support more effective collaboration across services and teams
- Work with colleagues to complete and collate a qualitative assessment of greenspace assets available per locality, in support of the 20-minute neighbourhood concept
- Continue to work with Planning colleagues to engage with children and parents to establish Play suitability
- Continue to work with Elected Members and our communities to inform potential works
- Explore opportunities for collaborative working with external bodies and Community Planning Partners
  - Collaborate with Planning colleagues to advocate for larger open spaces
  - Develop the working relationship with Tayside Health Partnership
- Work with colleagues to undertake a built estate asset challenge to identify and agree investment needs and priorities

## Principle 3: Enhance the sustainability and biodiversity of our Greenspace assets

### THE CHALLENGES:

- Effectively balancing the space requirements and usage with biodiversity and sustainability goals
  - Improving public understanding and appreciation of reduced mowing practices and the transition towards sustainable planting
  - Different approach needed for maintaining rewilded areas (equipment and staffing)
- Weed and invasive species management has been impacted by reduced chemical usage, supported by legislative changes
- The maintenance burden created by historic planting choices and high-maintenance assets
- The existing nursery buildings and workshops require modernisation (Westbank)
- Newer playground equipment does not have the same longevity as historic, less complex, equipment/materials and is therefore not sustainable
- Potential planting restrictions within burial grounds

### WE WILL:

- Explore resources for community education and communications around the biodiversity benefits of reduced mowing and the introduction of pollinator-friendly herbaceous plants
  - Implement Grassland Management Plan based on completed Grassland Management trials and community consultation around this
- Continue to manage invasive species such as laurels, rhododendron and ragwort via targeted interventions and community engagement and participation
  - Work with relevant colleagues to create a Ragwort Policy
- Work with communities to deliver the Shrub Renovation Programme
- Continue to grow plants and trees from our own seeds and cuttings to minimise costs and promote sustainable production
- Continue to prioritise native plants and improve the resilience of greenspaces to ongoing environmental changes
- Work with Property Services to prioritise works for building maintenance and upgrade
- Where appropriate utilise local, durable materials and in-house resource to maintain or build assets
- Adhere to approved Sustainable Procurement Policy to ensure the delivery of additional community benefits
- Work with Historic Scotland and Community Groups to include more biodiverse areas within closed cemeteries through the introduction of pollinators and trees

## Principle 4: Utilise life-cycle management and proactive maintenance

### THE CHALLENGES:

- Lack of complete asset data impedes data-led decision making and the creation of a dynamic 30-year property investment plan
- To have effective modelling tools that support scenario planning
- To deliver programmes of work based upon life-cycle planning within resource limitations
- To focus on proactive rather than reactive works within resource limitations
- Understanding and agreeing the long-term maintenance requirements of rewilded land and invasive species

### WE WILL:

- Work with colleagues to undertake an asset data assessment and develop an improvement plan to allow for a more effective asset challenge process
- Work with colleagues and other Local Authorities to establish modelling tool requirements
- Re-establish APSE participation and utilise data to establish comparable benchmarking
- Continue to develop and complete scheduled inspections, working with colleagues to address funding shortfalls that are impacting on inspection intervals and related asset condition
- Continue to develop proactive maintenance programmes:
  - Continue to progress Shrub Renovation programme
  - Work with colleagues and external partners to develop a rewilding and invasive species strategy
  - Progress headstone stability programme
  - Progress decisions around footpath inspections



## Asset Overview

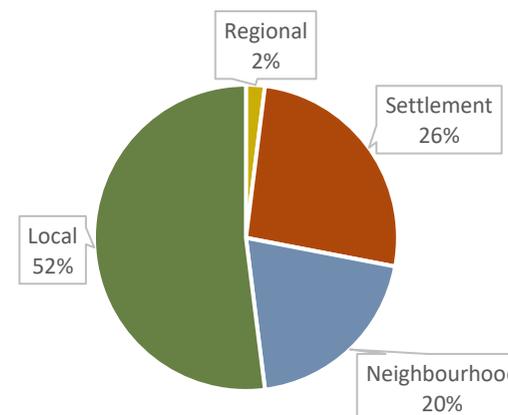
Community Greenspace presently manages a total of approximately 1,614 separate greenspaces which are defined by hierarchies and typologies:

### Hierarchies

Greenspaces are categorised based on their relative importance to the community and users, termed hierarchy. These range from local greenspaces such as Larch and Birch Place in Perth, to larger areas of regional greenspaces such as MacRosty Park in Crieff. Play Areas have adopted their own hierarchy which is outlined in The Play Strategy (2006), which is currently under review.

| Hierarchy     | Description                                                                                                                                                    | Examples                                                               |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|
| Regional      | Large sites attracting visitors from beyond the settlement.<br><br>Premier Parks are a selection of Regional Greenspace developed to meet Green Flag Standard. | MacRosty Park Crieff, Kinnoull Hill & North Inch, Perth                |
| Settlement    | Large or high-profile sites which are used or seen by people across the whole settlement.                                                                      | Victory Park, Meigle & Myre Park, Kinross                              |
| Neighbourhood | Sites which are important to a larger distinct area of a settlement.                                                                                           | Craigie Park, Perth & Braidhaugh Park, Crieff                          |
| Local         | Smaller sites important within a small area of a settlement.                                                                                                   | Cul-de-sacs, lock-up sites and housing areas not on main thoroughfares |

### Greenspace Hierarchies breakdown by percentages



### Typologies

Alongside hierarchical categorisation, greenspaces are further classified based on their primary use, referred to as typology, for example public parks and gardens and amenity greenspace. There are greenspaces that have more than one typology as they provide additional functions, for example where there are sports pitches and play areas in a single public park.

#### Primary Typology

There are 11 types of primary typology, which reflect the overall type of greenspace and help to give consistency at a national level. For example the North Inch in Perth is classified as a Public Park and Garden rather than a sports pitch or play space. Care is therefore needed when analysing lists and numbers of types of greenspaces based only on primary typology, with secondary typologies being used to further inform these.

The typology of each greenspace is used to inform the planting, management, refurbishment and programmes for delivering the service.

| Primary Typology                       | No. | Example                                                                               |
|----------------------------------------|-----|---------------------------------------------------------------------------------------|
| Public parks and gardens.              | 95  | Mill St (Alyth), Victory Park (Meigle), King George V Park (Methven).                 |
| Private gardens or grounds.            | 143 | Mill St (Stanley), Family and Child Centre (Muirton).                                 |
| Amenity greenspace.                    | 768 | Ferguson Park Estate, Rattray and Turleum Road, Crieff.                               |
| Playspace for children and teenagers.  | 56  | Friarton Park, (Perth), Play area (Powmill), Williamson Hall (Abernethy).             |
| Sports Areas.                          | 34  | Recreation Park (Pitlochry), Diamond Jubilee Park (Alyth), Lesser South Inch (Perth). |
| Natural/ semi natural greenspace.      | 62  | Buckie Braes, Oakbank (Perth), Burnside (Aberfeldy), Kinnoull Hill (Perth).           |
| Allotments & community growing spaces* | 8   | North Perth Allotment, Tulloch                                                        |
| Civic Space.                           | 14  | Fergusson Gallery (Perth), James Square, Crieff, The Square (Aberfeldy).              |
| Burial grounds.                        | 139 | Findo Gask Churchyard.                                                                |
| Other functional greenspace.           | 161 | Lock ups (Inchture), Gairney Bridge (Kinross).                                        |
| Green corridors.                       | 134 | Scone Den (Scone), Riverside Walk (Kirkmichael), Kincardine Walk (Crieff)             |

\*Note: The Council do not directly manage allotments but lease sites to community allotment associations and facilitate their development.

This plan relies on the presently available inventory for Greenspace assets as at 31 March 2023.

## Secondary Typology

Greenspaces such as North Inch, Perth have more than one typology as they provide additional functions, for example there are sports pitches and play areas in this park.

The quantity of each secondary typology managed by Community Greenspace is shown in the table below:

| Secondary Typology                    |                  | Number     |
|---------------------------------------|------------------|------------|
| Playspace for children and teenagers. | Skateboard areas | 9          |
|                                       | Play Areas       | 145        |
| Sports areas.                         | Football/ rugby  | 88         |
|                                       | Golf Course      | 1          |
|                                       | Cricket Square   | 3          |
| <b>Total secondary typologies</b>     |                  | <b>246</b> |

## Play Areas

The Council's play areas are defined by a different set of hierarchy criteria, as the play strategy pre-dates the PAN 65 recommendation. The play areas are graded according to the average age and number of primary users, and the play facilities provided in each play area to meet the related needs:

| Hierarchy                                | Description                                                                        | Examples                     | Number     |
|------------------------------------------|------------------------------------------------------------------------------------|------------------------------|------------|
| Premier Equipped Area for Play (Premier) | The biggest play areas in busiest locations for 4-14 year-olds.                    | South Inch, Perth            | 9          |
| Neighbourhood                            | The largest neighbourhood play areas for 4-14 year-olds outwith rural settlements. | Victory Park, Bridge of Earn | 30         |
| Rural Equipped Area for Play (Rural)     | Large neighbourhood play areas for 4-14 year-olds within rural settlements.        | Admiralty Wood, Almondbank   | 54         |
| Local Equipped Area for Play (Local)     | Small local play areas for 4-8 year-olds.                                          | Dryburgh Crescent, Perth     | 52         |
| <b>Total</b>                             |                                                                                    |                              | <b>145</b> |

## Assets

The infrastructure within Greenspaces consists of a variety of asset types, soft landscape, hard landscape and infrastructure assets. Most sites contain a mixture of all three asset types:

| Soft Landscape Quantity               |                                    |
|---------------------------------------|------------------------------------|
| Asset                                 | Number/Measure                     |
| Grass                                 | 520.3 hectares                     |
| Planting                              | 3.8 hectares                       |
| Water (Ponds)                         | 4                                  |
| Trees                                 | 32,000<br>estimated                |
| Hedges                                | 105,430 linear metres<br>estimated |
| Hard Landscape Quantity               |                                    |
| Asset                                 | Number/Measure                     |
| Hard Surface (paths/ rural car parks) | 103.5 hectares                     |
| Play Space for Children and Teenagers |                                    |
| Artificial turf/ Sand carpet          | 0.74 hectares                      |
| Bark pit                              | 1.0 hectares                       |
| Bitumen/ hard surface                 | 1.99 hectares                      |
| Rubber tile/ crumb                    | 1.01 hectares                      |
| Skate parks hard surface              | 0.54 hectares                      |

## Infrastructure Assets

The number of infrastructure assets can vary over time depending on customer demand, the condition of the asset, service requests from individuals/groups and available funding. Their provision at sites is dependent on the typology and hierarchy of the greenspace within which they are sited:

| Infrastructure Asset Quantity                 |              |
|-----------------------------------------------|--------------|
| Asset                                         | Number       |
| Art Features                                  | 32           |
| Benches                                       | 1,268        |
| Bollards                                      | 486          |
| Bridges                                       | 159          |
| Cycle Stands                                  | 64           |
| Dog Bins                                      | 333          |
| Drainage (sumps etc)                          | 20           |
| Fences                                        | 510          |
| Flagpoles                                     | 40           |
| Floral Containers                             | 105          |
| Gateways                                      | 609          |
| Goal Posts                                    | 253          |
| Grilles                                       | 37           |
| Handrails                                     | 161          |
| Leaflet Cairns                                | 2            |
| Life Saver Throw Lines                        | 14           |
| Litter Bins                                   | 1,028        |
| Picnic Tables                                 | 140          |
| Play Equipment Sited on Children's Play Areas | 994          |
| Route Markers                                 | 38           |
| Rugby Posts                                   | 6            |
| Signs                                         | 1,856        |
| Standpipes (outdoor faucets)                  | 53           |
| <b>Total</b>                                  | <b>8,208</b> |

## Exclusions

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In a report to The Environment Service Senior Management Team on 29 October 2015, the responsibility for the inspection and maintenance of greenspace assets was clarified and agreed. Exclusions are listed below:

- Properties located on greenspace, for example sports changing facilities, are provided and maintained by Property Services.
- Metered electrical supplies are maintained by Property Services.
- Memorial structures are maintained by Property Services.
- Retaining walls and fences on greenspaces are maintained by Roads or Property Services (as appropriate) to provide advice/ assistance.
- Play areas and item assets located within school grounds, are installed and maintained by Education and Children's Services.
- Unmetered lights and events boxes in greenspaces are inspected and maintained by The Street Lighting Partnership.
- Other lighting in greenspaces for example the all-weather pitch in Larghan Park in Coupar Angus are maintained by 3rd parties such as the Coupar Angus Residents Association.
- Allotments and community growing spaces are managed by each allotment site association.
- Trees located on non- Community Greenspace Council land (e.g. ECS carparking or council house gardens) are not inspected or maintained by CGS, instructed works are recharged to the relevant service.
- The Crematorium, although managed by Community Greenspace, does not form part of this plan which is for the management of greenspace assets.

## Key Factors Influencing Delivery of Greenspace Asset Management

The management of our Greenspace asset is subject to influence by a variety of factors, including:

| External                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Internal                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Environmental factors, such as weather patterns and climate change can impact the condition and resilience of greenspace assets</li> <li>• Regulatory and statutory changes at both UK and Scottish Government level will occur throughout the life of this plan. These will be responded to and will affect how greenspace assets are managed and improved</li> <li>• Demographic changes within the Perth &amp; Kinross Council population will increase in the future, with the age profile becoming older. As a result, PKC's long-term green space requirements may change</li> <li>• Best practice guidance issued by professional organisations or other relevant bodies will be considered</li> <li>• Costs for energy, construction materials and professional advice will vary during the plan period with generally upward inflation pressures and therefore need to be considered on an ongoing basis</li> <li>• The degree of community involvement, engagement and fundraising in greenspace maintenance</li> <li>• The availability of grants, donations and other external funding sources can impact invest in greenspace assets</li> <li>• Recruitment to fill specialist horticulture, landscape design and environmental conservation roles is increasingly challenging</li> </ul> | <ul style="list-style-type: none"> <li>• Service modernisation and new ways of working may change greenspace requirements; therefore provision will need to evolve and be flexible</li> <li>• Efficiencies in resource usage will be required to reduce long-term operating costs</li> <li>• The Council is committed to reducing carbon, this will influence greenspace design and the management and recording/reporting of our greenspace assets</li> <li>• The availability of land for greenspace development and the pressures of urban development can shape the location and design of greenspace assets</li> </ul> |

## Baseline Position

For capital accounting purposes the (unaudited) net book value of Community Greenspace assets as of 31 March 2023 is £7,591,001:

| Asset Type          | Value             |
|---------------------|-------------------|
| Cemetery*           | £499,655          |
| Parks & Open Spaces | £1,024,064        |
| Miscellaneous       | £24,904           |
| Infrastructure      | £6,042,378        |
| <b>Total</b>        | <b>£7,591,001</b> |

\*Excludes headstones

The original Community Greenspace Asset Management plan was approved by the Strategic Policy and Resources Committee on 29 November 2017 (Report no: 17/392 refers), since then unprecedented increases in costs relating to greenspaces has created a challenging situation for all local authorities. More than ever before, there is a fundamental requirement to ensure that all investment is effective and strategically guided.

Community Greenspace asset management use a WDM system, ELM, to store key asset data, manage bridge inspections and schedule ground maintenance works.

This data, and its upkeep and improvement, enables data-led decision making and provides a foundation for PKC's future plans for managing and investing in the asset.

### Condition

All assets must be in a safe condition in line with our statutory obligations.

For the purposes of asset management planning, greenspace infrastructure assets are considered as life expired at the point where the retention of the asset is no longer considered as representing value for money. As a result of this, assets may be retained beyond their anticipated replacement date.

However, generation-spanning assets (public parks, community gardens, cemeteries and trees) are designed to have long lifespans with no overall replacement date, instead individual elements, or assets within them, are maintained. These established

assets require significant investment in materials and maintenance to ensure their longstanding durability and functionality.

### Headstone Stability Programme

Our churchyards and cemeteries date back as far as 1580, consequently, some of the memorial stones within them are extremely old. Whilst the age of a stone does not guarantee its stability or instability, local authorities are expected to have a suitable memorial inspection programme in place.

The Health and Safety at Work Act 1974 requires all UK burial authorities to ensure that memorials are safe so that the potential for injury to those visiting and working in the cemetery is reduced. Whilst reports of serious incidents involving unsafe memorials are relatively rare and the risk of injury considered low, there have been fatalities.

With guidance from the Scottish Government and as part of a rolling five year Health and Safety memorial inspection programme, Perth & Kinross Council is carrying out safety inspections of memorials in all of the 176 cemeteries and churchyards which it maintains, using a risk assessment approach.

Memorials are visually assessed, and a hand test is completed to ensure the memorial is suitably stable. Where remedial works are required, they are progressed in alignment with the Memorial Safety in Council Cemeteries Policy and Procedures documentation.

### Infrastructure Assets - Playparks

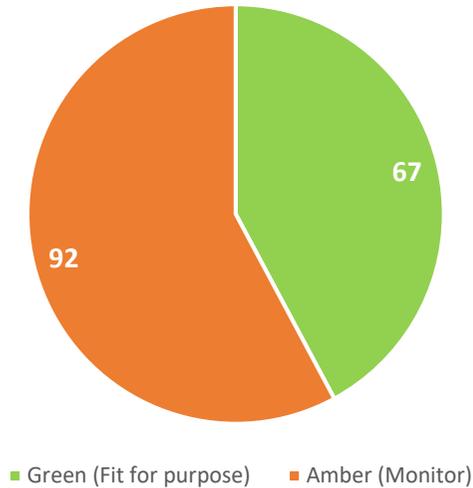
Play area infrastructure and related hard landscape are subject to a regular inspection regime, with premier play parks inspections conducted every month and all others inspected every two months. Annual inspections certify the safety and quality of each site and its play equipment.

Play equipment on each site is then reviewed annually against the approved Play Strategy scoring criteria and refurbishment dates are projected based on this data. Full refurbishment is typically scheduled when the equipment and surfacing approach their 15<sup>th</sup> year. However, the exact timing of refurbishment is dependent upon levels of site usage and the quality of the infrastructure, however any asset not meeting safety standards is removed.

## Infrastructure Assets - Bridges

The Community Greenspace Infrastructure Team carry out regular inspections on 159 foot bridges to ensure that they are all maintained in a safe condition for public use.

### Bridge Condition Ratings



Currently 92 (57.9%) of bridge assets are being monitored for reduced condition

All inspections are up-to-date, and no assets required immediate remedial works.

## Greenspace Site Inspections

Site inspections are carried out by Greenspace Rangers for parks and Bereavement Services for cemeteries, in accordance with an agreed inspection regime dependent on the site hierarchy.

Where defects are identified, this information is captured and works prioritised.

Land Audit Management Systems (LAMS) and Local Environmental Audit and Management System (LEAMS) are part of national benchmarking and a system designed to measure the standards of parks and amenity greenspace. A random sample of greenspaces is selected and assessed to highlight any adverse quality indicators such as vandalism, graffiti, dog fouling etc.

This metric allows for comparison of results between other local authorities and provides the basis for long-term evaluation and monitoring. However, PKC has not fully collected this data since 2019/2020.

## Suitability

The greenspace infrastructure assets are purpose bought/built and therefore suitability is generally implicit.

Play Park suitability is currently dictated based on whether the asset meets the existing Play Strategy, currently 71% of our play areas meet or exceed this.

## Utilisation

Generally our greenspace sites are well used, however, the free-to-access and open plan nature of our greenspace assets makes the collection of utilisation data complex.

Utilisation data can be captured on a small scale, as required, to inform specific projects.

## Value for Money

Association of Public Service Excellence (APSE) has established national value for money benchmarks based on input from Scottish Local Authorities. Currently PKC does not participate in submissions.

## Climate Change

There are no established benchmarks for climate change monitoring of greenspace assets.

Community Greenspace is currently working to procure and implement climate monitoring software which will enable the calculation of Greenhouse Gas (GHG) benefits from planted assets.

Existing maintenance and planting programmes have been re-assessed to contribute positively towards improved biodiversity and sustainability goals. No-mow areas have been introduced, sustainable materials and are being used where possible and planting has been changed to focus on utilising native, self-seeding plants.

## Compliance

All assets must be in a safe condition in line with relevant statutory obligations. The Community Greenspace Asset Management Plan is based upon delivering agreed service standards. The standards reflect the previously approved funding levels for greenspace asset maintenance and represent the standards that customers can expect from the Council's Greenspace Assets, listed in Appendix 2 - Service Standards.

The plan is underpinned by the following statutory drivers:

- Nature Conservation (Scotland) Act 2004
- Occupiers' Liability (Scotland) Act 1960
- Wildlife and Countryside Act 1981 (As amended)
- Scottish Biodiversity Action Plan
- UK Biodiversity Action Plan
- Disability Discrimination Act 2005
- Allotments (Scotland) Act 1892
- Burial Act 1857
- Environment Act 1995
- Land Reform (Scotland) Act 2003
- Scottish Planning Policy 11 (SPP 11)
- Local Government (Scotland) Act 2003
- Community Empowerment (Scotland) Act 2015
- Burial and Cremation (Scotland) Act 2016

Inspections are required to identify and prioritise required maintenance to ensure the safety and longevity of the assets. Each asset type has specific inspection types and frequencies:

| Asset Type          | Scheduled Inspection Type                                                                      | Number/Frequency                                                                                               |
|---------------------|------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|
| Play Parks          | Visual inspection by PKC Contractor                                                            | 9 premier playparks carried out monthly.<br>136 playparks carried out bi-monthly.                              |
|                     | Visual inspection by independent engineer                                                      | 145 carried out annually.                                                                                      |
| Bridges             | Visual inspection                                                                              | 159 bridges inspected every two years.<br>Frequency will be adjusted based on perceived levels of damage/risk. |
| Cemetery Headstones | Under 1.5 metres - Visual inspection and hand test, if considered safe to do so                | 90,000 required to be inspected within a 5-year cycle.                                                         |
|                     | Over 1.5 metres - Inspection by competent Structural engineer or suitably qualified contractor | Frequency will be adjusted based on perceived levels of damage/risk.                                           |
| Sports Pitches      | Visual inspection                                                                              | 37 annually.<br>Only pitches with registered teams are subject to inspection.                                  |
| Water Safety        | Visual inspection of water safety signage and review of risk assessment                        | 117 signs inspected on a 4 yearly schedule                                                                     |

Any identified works are risk assessed and prioritised for completion.

## Maintenance

Maintenance of greenspace assets is split into 3 workstreams:

|                                         |                                                                                                            |
|-----------------------------------------|------------------------------------------------------------------------------------------------------------|
| <b>Reactive Repairs</b>                 | Priority ad hoc repairs resulting from failure or vandalism                                                |
| <b>Planned Preventative Maintenance</b> | Programme of servicing to prolong lifecycle of equipment (lubricating play equipment and painting benches) |
| <b>Planned Maintenance</b>              | Planned revenue improvements (painting, clearing drainage, minor refurbishment)                            |

## Maintenance Backlog

Maintenance backlog is a theoretical measure of the investment required to restore the asset to an as new condition within its current use.

| <b>Asset Type</b>           | <b>Backlog Figure</b> |
|-----------------------------|-----------------------|
| Soft Landscape              | £200,000              |
| Hard Landscape              | £154,000              |
| Infrastructure - Bridges    | £0                    |
| Infrastructure - Play Parks | £42,327               |
| <b>Total</b>                | <b>£396,327</b>       |

Note: Hard Landscaping does not currently have an inspection regime in place, backlog figure is based on reported issues only, actual backlog figure is currently unknown.

## Volunteers Groups

The ongoing improvement and maintenance of greenspaces depends on the Council working closely in partnership with the community and community groups.

Maintenance standards are enhanced by the Council working closely in partnership with the community and community groups such as Friends of Parks group, bloom groups, paths groups, Friends of Cemetery groups, biodiversity/climate groups, Police Youth Volunteers, corporate volunteers, schools and youth organisations, community gardeners and allotment associations. Community Greenspace regularly engage with over a 100 such groups to help invest in and maintain greenspace assets. The groups assist through over 25,000 volunteer hours annually and often raise significant sums of money to invest in environmental improvements to our sites through external grants such as the council's Community Environment Challenge Fund, Community Investment Fund and Place Based Initiatives Fund as well as grants from the Gannochy Trust, the Heritage Lottery, Big Lottery, Scottish Landfill Communities Fund and other local charitable trusts.

## Cost of the Greenspace asset

Financial information relating to the costs of the greenspace asset are not currently captured and updated within the Greenspace Asset Management System (ELM - WDM). Orders are issued via PECOS and paid via Integra on a non-asset specific basis. Below is a summary of key information:

### The Investment Blueprint

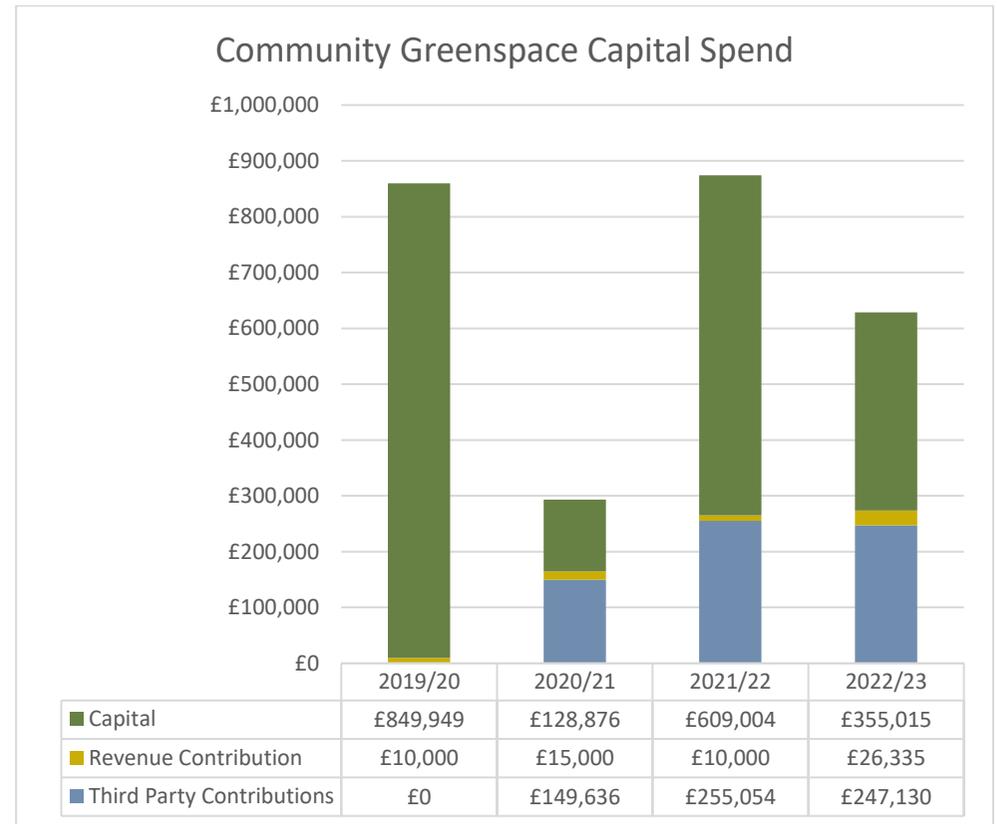
In 2021 Perth & Kinross Council approved the Investment Blueprint, which sets out the rationale and key drivers for change. It provides five overarching principles to inform decision-making and direct the investment of public money where it is most needed. The principles are, that our investment decisions must: -

- mitigate against the impact of climate change
- promote inclusive economic growth and a vibrant community
- promote equality and
- support the delivery of sustainable public services through effective management of our assets
- promote and enhance digital inclusion

The Blueprint's function is to identify future investment priorities and to establish a more transparent and flexible approach to investment decision-making, ensuring that capital investment decisions support corporate objectives and priority outcomes.

## Capital

Greenspace capital expenditure is illustrated in the chart below, total capital expenditure for 2022/2023 was **£628,480**:



## 6-Year Funded Capital Programmes

These comprise both named projects and programmes of schemes of maintenance or improvement work derived from condition data and local knowledge:

| Programme Name                                              | Purpose                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Play Areas Improvements Strategy                            | This is a programme of works to refurbish/upgrade play areas to deliver play area strategy - this programme also involves working with communities to allow them to apply for additional monies to enhance their local sites' budgets                                                                                                                                                                                                                                                                                                              |
| Play Areas Improvements Strategy – Third Party Contribution | Confirm Developer Contributions from Section 75 agreements. Work with local community groups to bring in external funding to top up and enhance capital spend on play areas refurbishment                                                                                                                                                                                                                                                                                                                                                          |
| Small Parks Upgraded                                        | Minor Capital works to upgrade and reduce risks                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Small Parks Upgraded – Third Party Contribution             | Minor Capital works to upgrade and reduce risks                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Community Greenspace Sites                                  | A programme of works to undertake works to Community Greenspace sites                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Alyth Environmental Improvements                            | Delivering environmental improvements to Alyth                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Premier Parks Upgrades                                      | Upgrades of Kirkgate Park, Kinross and Victoria Park Aberfeldy to ensure that quality is retained as appropriate for our premier parks. Works will include surfacing and play, and a rationalisation of planting. Davie Park Rattray upgrade will improve welcome, park setting and the loon braes in particular, enhancing and promoting the rural character of the park and working with the local community group. Works will include structure and waterside planting. 22/23 spend on award-winning Riverside Heather Gardens footpath upgrade |
| Countryside Sites                                           | A programme of works to improve the infrastructure of our countryside sites to ensure that visitor experience is maximised and fitting to the high quality natural features of these countryside sites                                                                                                                                                                                                                                                                                                                                             |
| The Knock                                                   | Upgrade of key countryside site (of local and visitor importance) which currently is a great natural asset                                                                                                                                                                                                                                                                                                                                                                                                                                         |

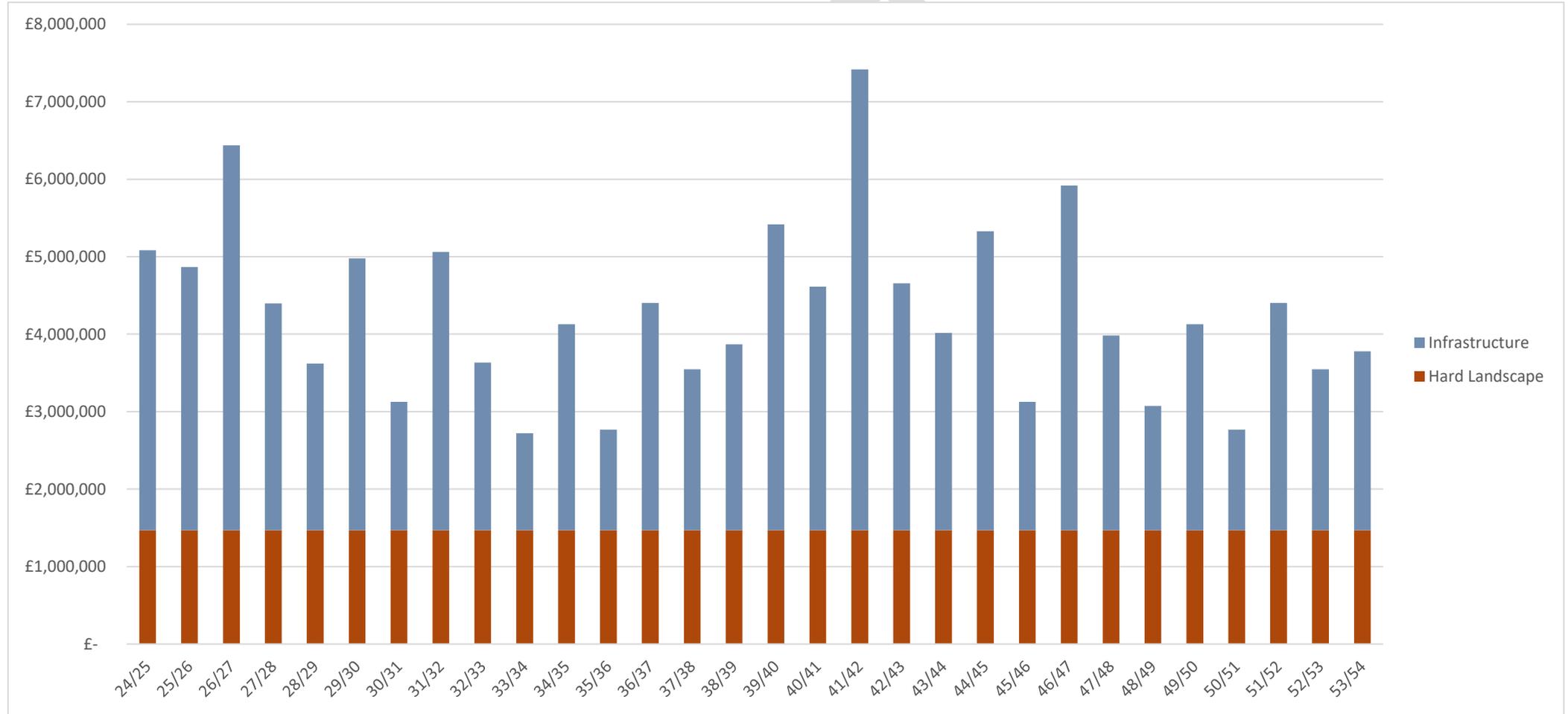
|                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                              | but with poor quality infrastructure and poor and confusing entrance areas. Improved arrival and welcome through gateway features, improved parking definition and visitor information; improved experience of the site use through signage and pathway improvements, seating; improved accessibility for all by improved gradients and surfacing and seating. Orientation and circulation. All proposals based on Management Plans and community and stakeholder consultation                                                                                                            |
| Kinnoull Hill                | Upgrade of key countryside site (of local and visitor importance) which currently is a great natural asset but with poor quality infrastructure and poor and confusing entrance areas. Improved arrival and welcome through gateway features, improved parking definition and visitor information; improved experience of the site use through signage and pathway improvements, seating; improved accessibility for all by improved gradients and surfacing and seating. Orientation and circulation. All proposals based on Management Plans and community and stakeholder consultation |
| Countryside Access           | Works will primarily be the installation of gates in relation to obstructions on core paths                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Crieff to Comrie             | CMRI-126. Crieff - Comrie long distance multi use path of potential local and national/ strategic importance. Close partnership working with Crieff Community Trust, Sustrans, Tactran and SNH; and ongoing landowner negotiations                                                                                                                                                                                                                                                                                                                                                        |
| Community Greenspace Bridges | Community Greenspace has 159 bridges that it maintains on Council land, and those servicing rights of way and core paths. Many of the bridges are small, but the remaining number varies from moderate to longer spans. Current project is the upgrade of Cuttleburn culvert                                                                                                                                                                                                                                                                                                              |
| 3G Pitch, Blairgowrie        | Community led development of a full sized 3G all-weather pitch at Davie Park Juniors ground in Rattray. BRCFC and working with PKC, SFA and Sport Scotland to develop an ambitious £1.2m pitch and changing facilities                                                                                                                                                                                                                                                                                                                                                                    |

|                                |                                                                                                                                                                                                                                                                                                                                                   |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Settlement/Neighbourhood Parks | Capital funding to refurbish neighbourhood parks. The creation of fun, stimulating, popular and well used parks. Working with communities to allow them to apply for additional monies to enhance their local sites                                                                                                                               |
| Auchterarder Public Park       | Premier Park and Play Area Refurbishment with Community Partnership                                                                                                                                                                                                                                                                               |
| Cemetery Extensions            | This project considers the strategy for future burial provision within the Perth and Kinross area to address areas where there is a supply of 10 years or less lair space. Current and future cemetery provision that will serve communities both urban and rural with cemetery's that offer an accessible, sustainable and fitting resting place |

### 30-Year Greenspace Investment Plan

To enable investment planning beyond the 6-year funded programme, a 30-year greenspace investment plan has been established based upon lifecycle planning of the current asset base. This unfunded plan serves as a tool for asset lifecycle planning, with the primary objective being to provide an asset-wide perspective that anticipates investment needs, net of inflationary increases.

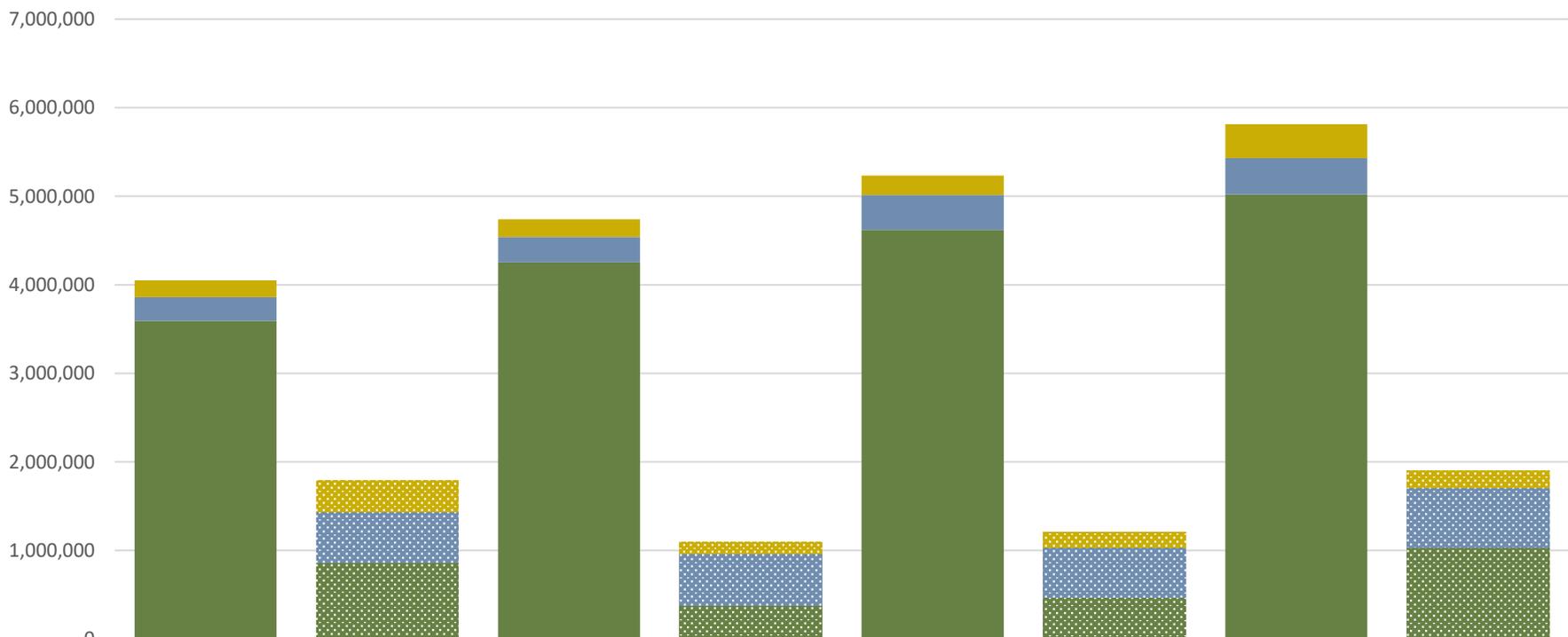
The plan projects a potential £128,815,739 million investment required over 30 years (2024-2054) to maintain the status quo and current asset provision, this is illustrated in the following chart.



Note: Soft Landscape assets (such as grass, trees and planting) are not included in this illustration due to the indefinite lifecycles of these assets

Greenspace revenue expenditure is illustrated in the chart below, total revenue expenditure for 2022/2023 was **£5,813,941**:

Revenue Expenditure & Income



|                          | 2019/2020 Expenditure | 2019/2020 Income | 2020/2021 Expenditure | 2020/2021 Income | 2021/2022 Expenditure | 2021/2022 Income | 2022/2023 Expenditure | 2022/2023 Income |
|--------------------------|-----------------------|------------------|-----------------------|------------------|-----------------------|------------------|-----------------------|------------------|
| ■ North Inch Golf Course | 188,630               | 354,474          | 201,887               | 136,511          | 219,673               | 174,377          | 385,047               | 188,425          |
| ■ Burials                | 269,495               | 577,032          | 285,760               | 576,592          | 393,564               | 561,507          | 408,360               | 681,115          |
| ■ Community Greenspace   | 3,591,481             | 858,692          | 4,253,209             | 383,450          | 4,619,452             | 472,770          | 5,020,534             | 1,030,039        |

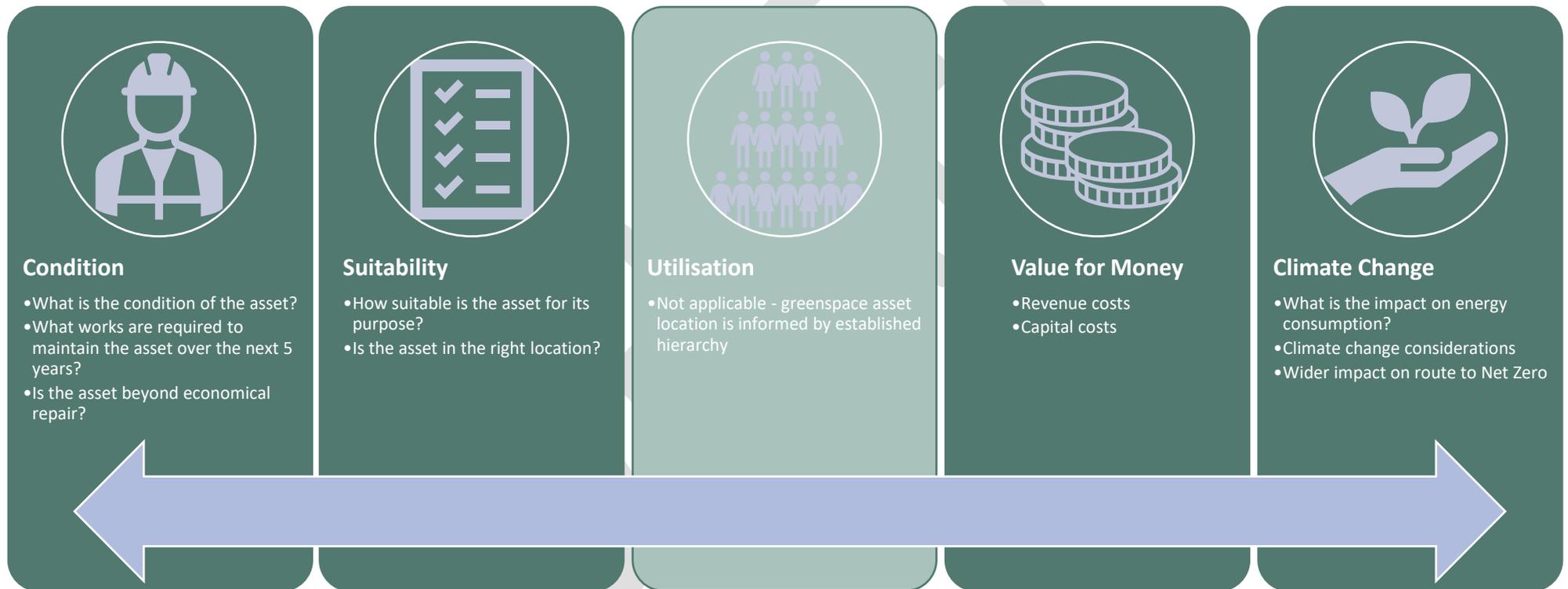
■ Community Greenspace   ■ Burials   ■ North Inch Golf Course

## How We Will Inform Investment - Asset Challenge

In line with our Corporate Asset Management Strategy, and related principles, we will ensure that investment within greenspace is effectively targeted via the undertaking of an assessment and challenge of all greenspace assets:

- as a key part of annual benchmarking
- as a key part of the annual capital budget process
- as a key part of the annual revenue budget process

This process will be applied as outlined below:



Any proposals that require investment or change the use of an existing asset such as new assets, repair or refurbishment will prompt an **Asset Challenge** and be considered within the context of a locality review. Prior to progressing any investment requests, data will be collated and reviewed to ensure that the proposed course of action is the best method to meet the service need.

Annual monitoring and review of greenspace assets will be completed to ensure that they meet agreed standards:

| Asset Classification                          | Asset Type                  | Condition<br><br>(Lifecycle – years) | Suitability<br>                | Value for Money<br> | Climate Change<br> |
|-----------------------------------------------|-----------------------------|-----------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|
| Soft Landscape                                | Grass                       | These asset types have indefinite lifecycles                                                                          | Assets should be low-maintenance, sustainable and bio-diverse                                                    | Ensuring that the maintenance option chosen offers best value in terms of repair cost vs longevity     | Considering material types used                                                                       |
|                                               | Planting                    |                                                                                                                       |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Water (Ponds)               |                                                                                                                       |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Trees                       |                                                                                                                       |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Hedges                      |                                                                                                                       |                                                                                                                  |                                                                                                        |                                                                                                       |
| Hard Landscape                                | Countryside paths           | 10                                                                                                                    | These assets are built, upgraded and maintained based on user or design needs; therefore suitability is implicit | Ensuring joined-up working (cross-service and business)                                                | Recycling and re-using materials where possible                                                       |
|                                               | Hard Surface (tarmac)       | 20                                                                                                                    |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Artificial turf/sand carpet | 15                                                                                                                    |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Bark pit                    | 3                                                                                                                     |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Rubber tile/crumb           | 8-10                                                                                                                  |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Skate Parks hard surface    | 15                                                                                                                    |                                                                                                                  |                                                                                                        |                                                                                                       |
| Infrastructure                                | Benches                     | 10                                                                                                                    | Assets should be fit for purpose, low-maintenance and sustainable                                                | Assets acquired via a compliant route to market                                                        | Climate impact evaluated as part of acquisition process                                               |
|                                               | Bollards                    | 10                                                                                                                    |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Bridges                     | 15                                                                                                                    |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Cycle Stands                | 15                                                                                                                    |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Drainage (sumps etc.)       | 20                                                                                                                    |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Fences                      | 20                                                                                                                    |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Flag Poles                  | 20                                                                                                                    |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Floral Containers           | 7-15                                                                                                                  |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Gateways                    | 20                                                                                                                    |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Goal Posts                  | 15                                                                                                                    |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Handrails                   | 20                                                                                                                    |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Life Saver Throw Lines      | 3                                                                                                                     |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Litter Bins (multipurpose)  | 10                                                                                                                    |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               | Picnic Tables               | 10                                                                                                                    |                                                                                                                  |                                                                                                        |                                                                                                       |
| Play Equipment Sited on Children’s Play Areas | 15                          |                                                                                                                       |                                                                                                                  |                                                                                                        |                                                                                                       |
|                                               |                             |                                                                                                                       | External maintenance is tendered<br>Internal maintenance with direct services (and in-house repair costs)        |                                                                                                        |                                                                                                       |
|                                               |                             |                                                                                                                       | Working with volunteers to ensure the best employment of community workforce                                     |                                                                                                        |                                                                                                       |
|                                               |                             |                                                                                                                       | Working with communities to ensure targeted resource                                                             |                                                                                                        |                                                                                                       |

|  |                              |    |  |  |  |
|--|------------------------------|----|--|--|--|
|  | Route Markers                | 15 |  |  |  |
|  | Rugby Posts                  | 15 |  |  |  |
|  | Signs                        | 15 |  |  |  |
|  | Standpipes (Outdoor Faucets) | 15 |  |  |  |

## How We Will Inform Investment – Adherence to Strategic Principles

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The following pages are grouped into the four strategic principles set out within the Community Greenspace Asset Management Strategy. They provide context and specific background information:

1. Continue to collaborate with communities and volunteers to improve well-being
2. Work collaboratively to maximise shared opportunities
3. To enhance sustainability and biodiversity within our Greenspace assets
4. Utilise life-cycle management and proactive maintenance



**Principle 1: Continue to collaborate with communities and volunteers to improve well-being**

**Work with relevant colleagues to address resource limitations:** We will work to clearly define resource limitations and their related impact, utilising this information to establish prioritised maintenance goals, whilst seeking alternative funding sources or methods of service delivery.

**Continue to seek and utilise funding to purchase equipment, and provide associated training, for communities to support them in managing their local greenspaces:** We will continue to focus resource on delivering and enabling this training. This is prioritised due to the importance of volunteer groups input our ability to meet our maintenance KPIs, and also due to the positive impact that community engagement has on community well-being

**Continue to seek input from residents, asset users and community groups to understand their needs:** We will actively engage with residents, asset users and community groups through regular social media surveys/engagement and seeking feedback from members of the community we work closely with. In order to benefit from innovative or best practice solutions we will continue to work with, and reach out to other Councils, to discuss their successful projects and understand any lessons learned so we can incorporate this into our works, ensuring continuous improvement.

**Continue to actively work with community groups to design, raise funds and deliver versatile green spaces, enhancing their utilisation and accessibility via a multi-purpose approach:** We will continue to involve community groups in the design and specification of our greenspaces and promote versatile designs that accommodate varied activities and focus on accessibility for all and sustainability. We will foster this ongoing collaboration/communication to facilitate and enable fundraising at the onset of these projects and continue this beyond delivery to promote community-involved maintenance. We will agree evaluation intervals to ensure the spaces continue to meet community needs.

**Work with colleagues to further empower communities to manage small non-built green spaces:** We will continue to work with colleagues to conduct needs assessments and engage in open dialogue with residents in order to best provide or

recommended space(s) that meet their needs. To facilitate the uptake of greenspace management we will continue to provide training and resources, where we have budget allowance, and further establish partnerships to support community members to take an active role in the management of their local greenspaces. We will continue to maintain regular contact and celebrate successes with existing volunteer groups to promote long-term sustainability and inclusivity in community-led green space initiatives.

**Continue working with Tayside Health Partnership to connect health providers with Greenspace assets, enabling social prescribing:** As part of the established working group we will explore ways to streamline the referral process and ensure healthcare professionals are aware of available greenspace resources and volunteer groups.

## *Principle 2: Work collaboratively to maximise shared opportunities*

**Use the Officer Public Realm Group to support more effective collaboration across services and teams:** To ensure ongoing and effective collaboration this group will be formally re-established, with re-outlined scope and objectives. Representatives will be sought from all stakeholders to facilitate communication and coordination to identify common goals and projects between the differing departments. The group will foster knowledge-sharing and promote cross-training opportunities to promote cohesive and successful collaboration across PKC.

**Work with colleagues to complete and collate a qualitative assessment of greenspace assets available per locality, in support of the 20-minute neighbourhood policy:** Working with Planning colleagues we will input into the ongoing review that is being completed as part of the Scottish Government's Play Suitability and will ensure any outcomes are aligned with, and support, the existing approved Play Strategy.

**Continue to work with Elected Members and our communities to inform potential works:** We will continue to emphasise appropriate co-creation and prioritisation which considers local needs and provides regular updates. This ongoing engagement will promote strong partnerships and ensure that relevant programmed works align with community needs and priorities.

**Explore opportunities for collaborative working with external bodies and Community Planning Partners:** We will actively approach collaboration with relevant external bodies and Community Planning Partners to promote research, identify common objectives and discover areas where joint projects, shared resources and expertise could lead to mutual benefits and improve service delivery.

**Work with colleagues to undertake a built estate asset challenge to identify and agree investment needs and priorities:** Taking cognisance of the overall service delivery needs and KPIs of the property estate, we will work with Property Services to facilitate an asset challenge of the built assets on greenspace sites and provided input and community feedback relating to these in order to effectively prioritise investment and where appropriate rationalise the estate.

### **Principle 3: Enhance sustainability and biodiversity within our Greenspace assets**

#### **Explore resources for community education and communications around the biodiversity benefits of reduced mowing and the introduction of pollinator-friendly herbaceous plants:**

We will work to identify and compile available educational resources and the research the best way to communicate this information to stakeholders. We will seek collaboration with neighbouring Council's, local environmental groups and experts to develop and publicise this material to the community via the most cost-effective and impactful delivery methods.

In support of this we will ensure that the implementation of the Grassland Management Plan is based on the insights gained from completed trials and involves ongoing community consultation to build support and awareness.

#### **Continue to manage invasive species such as laurels, rhododendron and ragwort via targeted interventions and community engagement and participation:**

We will continue to foster community engagement and participation by organising workshops, volunteer programs and awareness campaigns to educate residents about the ecological impacts of invasive species and involve them in control efforts. This will be supported by the creation and approval of invasive species management policies that will establish a long-term management plan, combining expert-led interventions with ongoing community collaboration, to ensure the sustainable control and prevention of invasive species.

**Work with communities to deliver the Shrub Renovation Programme:** We will continue to encourage community participation in shrub maintenance and focus on promoting the removal of high-maintenance unsuitable plantings, and within budget limitations, fund replacing these with more biodiverse, sustainable, self-seeding options. Where PKC is wholly responsible for shrub maintenance we will systematically remove and replace high-maintenance plantings with suitable replacements (grass or self-seeding, low-maintenance shrubs).

**Continue to grow plants and trees from our own seeds and cuttings to minimise costs and promote sustainable production:** We will prioritise using self-grown, native

plants that improve the resilience of greenspaces to ongoing environmental changes. These will be harvested from our plants and grown in our nurseries, both minimising costs and furthering the propagation of our own native plants/trees.

**Work with Property Services to prioritise works for building maintenance and upgrade:** Taking cognisance of the overall service delivery needs and KPIs of the property estate, we will work with Property Services to fund and suitably prioritise maintenance and upgrade works required for our plant nursery and workshops.

**Where appropriate utilise local, durable materials and in-house resource to maintain or build assets:** We will continue to assess the availability and sustainability of local materials, and utilise in-house capabilities for asset maintenance and construction, ensuring that skilled personnel are both trained and equipped to maximise the use of these resources whilst minimising costs.

**Adhere to approved Sustainable Procurement Policy to ensure the delivery of additional community benefits:** Community Greenspace will continue to utilise approved procurement routes to market to obtain compliant pricing and contract terms. Asset requirements will be used to inform relevant procurement strategies e.g., purchasing, constructing in-house or outsourcing, depending on the specific needs and cost considerations. By continuing to optimise procurement practices, CGS will ensure cost-effectiveness throughout the entire lifecycle of our assets.

**Work with Historic Scotland and Community Groups to include more biodiverse areas within closed cemeteries through the introduction of pollinators and trees:** We will initiate a collaborative effort with Historic Scotland and Community Groups to assess the feasibility and potential locations for introducing pollinator-friendly plants and trees. Planning the integration of these elements will consider the both the ecological needs of the local environment and the nature of the land.

#### *Principle 4: Utilise life-cycle management and proactive maintenance*

**Work with colleagues to undertake an asset data assessment and develop an improvement plan to allow for a more effective asset challenge process:** Data collection and management requires continuous updating and ongoing review and improvement of asset data and a bespoke approach for each asset type. Accurate and dynamic data is essential to guide effective decision-making and resource allocation. The maturity of our asset data will be recorded and monitored as part of the annual status report.

**Work with colleagues and other Local Authorities to establish modelling tool requirements:** A key enabling factor of this process requires a data cleanse and related gap analysis to be completed. Community Greenspace will work with the Capital Investment and Asset Management Team to complete this and involve WDM in any requirements to update ELM to either hold additional data or provide additional functionality.

We will seek to work with other Council's that utilise ELM to develop a comprehensive set of requirements, ensuring that the tool aligns with the diverse needs and priorities of multiple Local Authorities. This will be beneficial in terms of both shared knowledge/insight and also in terms of shared development costs.

**Re-establish APSE participation and utilise data to establish comparable benchmarking:** The Association for Public Service Excellence (APSE) is a collaborative network that supports local authorities in enhancing their frontline services. With over 250 member councils across the UK, APSE provides expert advice, information, and expertise on various public services.

PKC will re-establish participation in the APSE Performance Benchmarking Group to develop comparable benchmarking and performance indicators.

**Continue to develop and complete scheduled inspections, working with colleagues to address funding shortfalls that are impacting on inspection intervals and related asset condition:** To ensure the completion of scheduled inspections, within existing budget, we will work with colleagues to assess the criticality of inspections and prioritise high-priority assets and statutory inspections. We will explore opportunities

to secure additional funding through grant applications, partnerships, or reallocation of resources to maintain adequate inspection intervals and address asset condition concerns. Inspection schedules will be subject to ongoing monitoring, adjustment and resource allocation reviews to optimise asset management within available budget constraints. Complete of a data gap analysis and related enablement of modelling tools/scenario planning will offer significant insight and improvement to this process.

**Continue to develop proactive maintenance programmes:** Via adherence to existing maintenance priorities, and ongoing works to improve asset data to more effectively allocate resources, we will continue to improve our long-term maintenance plan which includes routine inspections, landscape improvements and community engagement initiatives. Continuous monitoring of programme progress, gathering feedback from stakeholders and adjusting as necessary, will aid in ensuring the sustained health and attractiveness of greenspaces.

## Appendix 2 - Service Standards

The Community Greenspace Asset Management Plan is based upon delivering the service standards below. The standards reflect the previously approved funding levels for greenspace asset maintenance and represent the standards that customers can expect from the Council's Greenspace Assets during the plan period. Details of how the specific greenspace assets are measured are shown below:

| Measured By                                                                                                                                                                                                              | Target Standard          |                   |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|-------------------|
|                                                                                                                                                                                                                          | Standard                 | Target Compliance |
| <b>Parks and Open Spaces</b>                                                                                                                                                                                             |                          |                   |
| Ensure our Parks and Open Spaces are managed and maintained in accordance with the schedules and specifications. Sample of selected sites (70) inspected in accordance with Land Audit Management System (LAMS) scoring. | LAMS Score 67 or above   | 100%              |
| <b>Play Areas</b>                                                                                                                                                                                                        |                          |                   |
| Carry out play area maintenance and inspection by PKC Contractor                                                                                                                                                         | All sites every 2 months | 100%              |
|                                                                                                                                                                                                                          | Premier every month      | 100%              |
| Inspected once a year by independent engineer                                                                                                                                                                            | All sites annually       | 100%              |
| Number of play areas meeting play strategy standards                                                                                                                                                                     | 75%                      | 100%              |
| <b>Sports Pitches</b>                                                                                                                                                                                                    |                          |                   |

| Measured By                                                                                             | Target Standard                                                             |                                                                                               |
|---------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
|                                                                                                         | Standard                                                                    | Target Compliance                                                                             |
| Ensure our pitches are managed and maintained in accordance with the schedules and specifications.      | 90%                                                                         | 100%                                                                                          |
| Ensure renovation works are identified and implemented on a prioritised basis.                          | 100%                                                                        | 100%                                                                                          |
| <b>Bridges</b>                                                                                          |                                                                             |                                                                                               |
| Ensure all bridges are maintained in a safe condition for public use through a visual inspection.       | 2 years                                                                     | 100%                                                                                          |
| <b>Trees and Woodland</b>                                                                               |                                                                             |                                                                                               |
| Ensure our trees on our highest risk sites are inspected and appropriate work undertaken.               | Every 6 months                                                              | 100%                                                                                          |
| <b>Water Safety</b>                                                                                     |                                                                             |                                                                                               |
| Ensure our watercourse sites are inspected and appropriate work undertaken.                             | 80%                                                                         | 100%                                                                                          |
| <b>Cemetery Headstone Stability</b>                                                                     |                                                                             |                                                                                               |
| To carry out the testing and making safe of all memorial headstones, within all PKC managed cemeteries. | 10,000 memorials tested each year of the 90,000 memorials in P&K cemeteries | 100% of all memorials tested in all cemeteries. A 5-year rotation of inspections their after. |



# Fleet Asset Management Strategy

## Strategy Introduction

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The role of Fleet Management is to ensure that Perth & Kinross Council has the right vehicle, plant and equipment in the right place at the right time and at the right cost. The Fleet must meet regulatory requirements and support the strategic, corporate and service delivery goals of the Council.

Since the last Fleet Asset Management Plan was published in 2015, the environment in which the Council operates has changed considerably, creating a need for focus on decarbonisation, affordability and utilisation. This presents challenges and opportunities to drive change and examine how the Council delivers services, and the infrastructure needed to support this.

This strategy and related plan adhere to the overarching approach articulated within the **Corporate Asset Management Framework (CAMF)**; in terms of Fleet, it is made up of three separate sections:

- Corporate Asset Management Policy & Strategy
- Fleet Asset Management Strategy
- Fleet Asset Management Plan

The CAMF provides an organisational approach to asset management via corporate adherence to the following asset management principles, which are informed by those approved by the Strategic Planning and Resources Committee in November 2018:

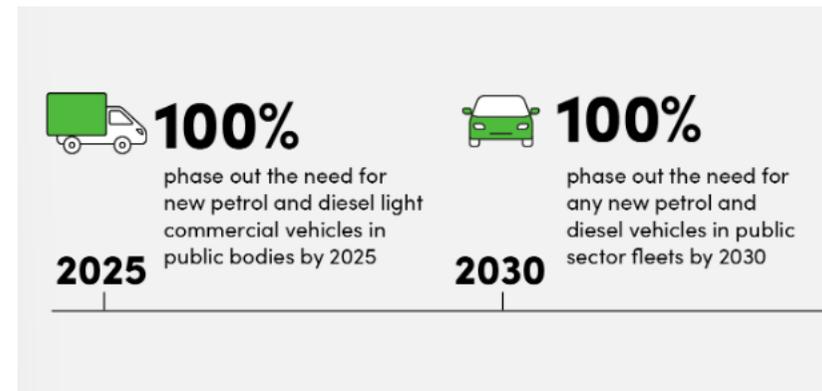
- All assets are considered as being corporate
- Assets will be identified and accurately recorded and managed via appropriate systems, to ensure they are as accessible as possible to all services/service users
- Assets will be safe, statutorily compliant, and economically and environmentally sustainable
- Where appropriate, benchmarks will be established and assets reviewed against these to aid investment planning
- The utilisation of assets will be maximised, meet communities' needs and support future service delivery

This document is supported by existing strategies and policies:

- Low Emission Vehicles (LEV) Fleet Strategy
- Fleet Usage Policy
- Fleet Fuel Policy
- Fleet Maintenance Policy
- Fleet and Mechanical Equipment Procurement and Registration Policy
- Policy for the Disposal of Fleet and Mechanical Equipment
- Mobility Strategy (Draft)
- Climate Action Plan

This strategy is underpinned by:

- The 2013 Scottish Government 'Switched on Scotland Roadmap', which outlines a long-term vision to achieve the widespread adoption of LEVs and remove petrol and diesel fuelled vehicles by 2050.
- The 2019 'Mission Zero for transport' outlines the phasing out of purchasing new petrol cars, diesel cars and small vans from the public sector fleet by 2025:



There is a “golden thread” that connects this Fleet Asset Management Strategy to the overarching Community Plan (Local Outcome Improvement Plan) vision of “A Perth and Kinross where everyone can live life well, free from poverty inequality”

This thread is illustrated below:

## Local Outcome Improvement Plan (LOIP)

*A Perth and Kinross where everyone can live life well, free from poverty inequality*

Tackling poverty

In partnership with communities

Physical and mental wellbeing

Children and young people

Tackling climate change

Vulnerable people

Stronger and greener economy

## Financial Strategy

## Infrastructure & Investment Plan for Scotland

## Transformation & Change

## Strategic Investment Planning Framework

## Corporate Asset Management Framework

## Fleet Asset Management Strategy

## Vision & Principles

---

The purpose of the Fleet Asset Management Strategy is to maximise the efficiency, reliability and service delivery potential of the fleet, whilst minimising downtime, expenses and risks.

In support of this our corporate Fleet Vision is:

**“To have a decarbonised fleet, supported by the right infrastructure, the right vehicles, plant and equipment all in the right place at the right time and at the right cost”**

We will achieve this via the delivery of the Fleet Asset Management Strategy, which is designed to provide a coherent and structured approach to Fleet asset management which will support PKC’s investment decision making.

The strategy will direct decisions relating to fleet procurement, allocation, maintenance and replacement and lead to improved operational efficiency, reduced costs and enhanced service delivery.

In support of the vision, and adherence to the CAMF, five strategic principles have been established, these will guide decision-making and ensure our fleet assets are being utilised effectively:

1. Establish an affordable and sustainable Fleet management model.
2. To utilise fleet assets efficiently and effectively.
3. Undertake proactive, preventative maintenance based on lifecycle planning.
4. Commit to decarbonising fleet operations through effective planning and investment.
5. Ensure that fleet assets are operated in a safe, and environmentally conscious manner, to protect drivers and the public.

## Challenges and Actions

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These Strategic Asset Management Principles adhere to the guiding principles of the Corporate Asset Management Framework and guide the Asset Management Plan:

### Principle 1: Establish an affordable and sustainable Fleet management model

#### THE CHALLENGES:

Not all fleet assets are managed on a corporate basis, preventing an overarching view of asset utilisation impacting on our ability to share assets effectively  
Developing the infrastructure to support non-carbon vehicles and plant in line with the Scottish Government's 'Mission Zero for transport' vision  
Upgrading to non-carbon vehicles and plant in line with the Scottish Government's 'Mission Zero for transport' vision  
The rising cost of purchasing and maintaining vehicles  
The ongoing fluctuation of fuel costs

#### WE WILL:

- Manage all of our Fleet Assets as corporate assets
- Update & create Service Level Agreements that inform the need, location and future fleet asset requirements
- Continue to procure at best value for costs relating to fleet asset acquisition, operation and maintenance
- Continue to complete reviews of all fleet assets condition, utilisation, value for money and climate change data, to enable effective asset challenge
- Continue to drive down grey fleet costs via data-monitoring and asset rationalisation and seek for savings to be directly reinvested in fleet improvement
- Implement a Tyre Policy to inform how we procure, replace and dispose of tyres and requirements for winter tyres across asset types
- Incorporate our Fleet Replacement programme into the 6-year funded programme and 30-year Investment Plan

Establish an affordable and sustainable Fleet management model

## Principle 2: To utilise fleet assets efficiently and effectively

### **THE CHALLENGES:**

The impact on operational delivery of maintenance (planned/unplanned) and breakdowns  
Processing and reporting of utilisation data for fleet and equipment

### **WE WILL:**

- Continue to conduct need assessments to evaluate key fleet and equipment requirements to optimise operational delivery
- Continue to manage the spare pool and extend vehicle lifecycles by rotating vehicle usage
- Establish utilisation benchmarks for all vehicles to inform asset lifecycle management
- Ensure that operational teams are reviewing allocated equipment lists against what has been issued

### Principle 3: Undertake proactive, preventative maintenance based on lifecycle planning

#### **THE CHALLENGES:**

Ensure dynamic lifecycle planning based upon asset data held within Key2  
Ensuring that our maintenance schedule provides optimum cost-benefit  
Projected future maintenance and investment costs for the current fleet are escalating

#### **WE WILL:**

- Monitor, set and review, on an ongoing basis, the lifecycle for each asset type
- Continue to gather asset data and further utilise this to inform decision making
- Continue to evaluate the projected costs associated with each asset type (labour, parts and downtime) and consider these costs against the benefits of replacing or disposing of the asset and the end of its projected lifecycle
- Monitor and review inspection frequencies based on manufacturer guidelines and asset data

Undertake proactive, preventative maintenance based on lifecycle planning

## Principle 4: Commit to decarbonising fleet operations through effective planning and investment

### THE CHALLENGES:

The Scottish Government has set a target to phase out petrol and diesel small fleet from the end of 2025 and our large fleet from 2030

Uncertainty on preferred future fuel source

Establishing a charging infrastructure to support a fully electric fleet

The high cost of electric vehicles and lack of availability

Based on Fleet Management experience so far electric vehicles have shorter lifecycles and ongoing innovation renders models obsolete quickly

Decarbonisation of small plant and equipment

### WE WILL:

- We will continue to work with Transport Scotland, Tactran Working Group, Switched on Fleets and Energy Saving Trust to explore future fuel options and innovations
- Continue to focus funding on establishing electric vehicle infrastructure to support a fully decarbonised fleet
- Confirm management arrangements for electrical charging infrastructure
- Continue to collate information in relation to the existing carbon footprint of our fleet operations and identify areas for improvement
- Investigate moving away from asset purchasing and lease electric vehicles from 2025
- Continue to upskill workforce to ensure we can maintain electric vehicles
- Begin to assess the requirements for decarbonisation of small plant and equipment

## Principle 5: Ensure that fleet assets are operated in a safe, and environmentally conscious manner, to protect drivers and the public

### THE CHALLENGES:

Ensuring that fleet operations comply with national, regional and local regulations, as well as industry-specific standards, such as health and safety regulations

Ensuring that drivers are adhering to safe driving practices and environmental regulations, including vehicle idling times

Staying abreast of new technology that can help improve fleet safety and reduce environmental impact

Implementing measures in a cost-effective manner that ensures safe and environmentally conscious fleet operations

### WE WILL:

- Continue to comply with Operator Licence requirements
- Work towards achieving Driver & Vehicle Standards Agency (DVSA) Earned Recognition Scheme
- Continue to carry out all statutory servicing and maintenance
- Continue to monitor vehicle idling times and ensure adherence to policy
- Continue to record relevant training and compliance information within Key2, the approved corporate system
- Continue to participate in Association of Public Service Excellence (APSE) and Freight Transport Association (FTA) working groups

Ensure that fleet assets are operated in a safe, and environmentally conscious manner, to protect drivers and the public



Establish an affordable and sustainable Fleet management model

Ensure that fleet assets are operated in a safe, and environmentally conscious manner, to protect drivers and the public

To utilise fleet assets efficiently and effectively

**Fleet Asset Management**

Commit to decarbonising fleet operations through effective planning and investment

Undertake proactive, preventative maintenance based on lifecycle planning

## Asset Overview

The Fleet Assets is organised into eight overarching categories:

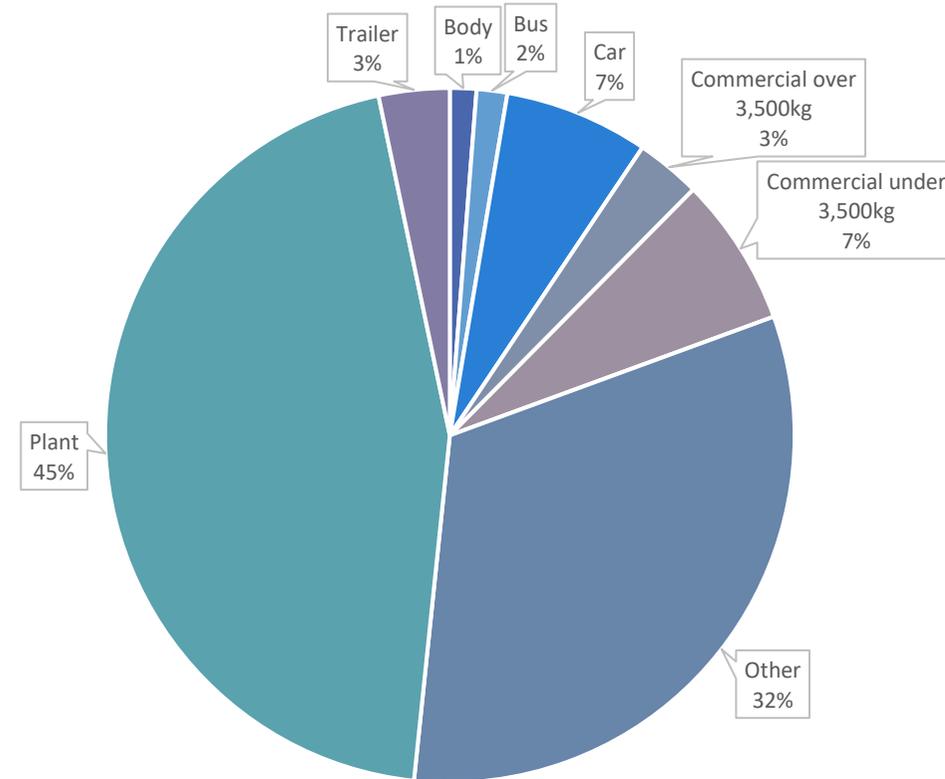
| Asset Classification     | Description                                                                     | Number (2023) |
|--------------------------|---------------------------------------------------------------------------------|---------------|
| Body                     | Demountable Body (7.5t - 12t)                                                   | 31            |
| Bus                      | Minibus (With Towbar) & Mobility Bus                                            | 36            |
| Car                      | 4x4, Hatchback, MPV & Staff Lease                                               | 162           |
| Commercial over 3,500kg  | Refuse Collection Vehicle, Hooklifts, Sweepers, Artic Unit & 12t Curtain-siders | 75            |
| Commercial under 3,500kg | Car Derived Van, Sweepers, Panel Van, Luton Van & Tippers                       | 170           |
| Other                    | Skips, Recycling Bells, Containers & Vehicle Ramps                              | 801           |
| Plant                    | Mowers, Hedge Trimmers & Leaf Blowers                                           | 1,022         |
| Trailer                  | Bulk Ejection Trailers, Tipping Trailers & Towed Trailers                       | 83            |
| <b>Total</b>             |                                                                                 | <b>2,380</b>  |

This plan relies on the presently available inventory for Fleet assets as at 31 March 2023.

### Exclusions

- Hand tools and power tools subject to PAT Testing
- Ladders
- JELS and Adult Day Centre's Equipment
- Breadalbane Academy Workshop Equipment
- Community Payback Workshop Equipment – Westbank Depot
- Cultural PK Library Vehicles

Asset Classification



## Key Factors Influencing Delivery of Fleet Asset Management

The management of our fleet assets is influenced by a variety of factors, which can be summarised as follows:

| External                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Internal                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• Regulatory and statutory changes at both UK and Scottish Government level will occur throughout the life of this plan. These will be responded to and will affect how fleet assets are managed and improved</li><li>• Demographic projections indicate an increase in population within Perth &amp; Kinross. As a result, Fleet requirements may change (e.g. additional refuse collection vehicles or additional vehicles for adult support)</li><li>• Changes to best practice guidance issued by professional organisations or other relevant bodies will be considered</li><li>• Balancing the needs of partner organisations and maximising opportunities through delivery of joint projects</li><li>• Costs for purchase, fuel and parts will vary during the plan period with generally upward inflation pressures</li><li>• The impact of current economic climate on the management and maintenance of our fleet</li><li>• Market changes and extending asset lifespan will vary receipts being generated from the sale of surplus assets</li><li>• Keeping abreast of the latest technological developments</li></ul> | <ul style="list-style-type: none"><li>• Service modernisation and new ways of working may change fleet requirements; therefore provision will need to evolve and be flexible</li><li>• Efficiencies in resource usage will be required to achieve a reduction in long-term operating costs</li><li>• The outcomes of the Waste Infrastructure Review may prompt operational changes and therefore impact fleet requirements</li><li>• The Council is committed to reducing carbon and improving the energy efficiency of our assets, this will influence planned asset replacements and associated infrastructure upgrades</li></ul> |

## Baseline Position

---

For capital accounting purposes the (unaudited) net book value of the Fleet as of 31 March 2023 is £22,230,005 which includes vehicles and plant equipment.

Unprecedented increases in costs relating to the purchase/leasing, fueling and maintenance of vehicles and plant equipment have created a challenging situation for all local authorities. More than ever before, there is a fundamental requirement to review our assets and ongoing liabilities, to ensure that all investment is effective and strategically guided.

Key asset data in relation to asset type, lifecycle information, utilisation, value for money and climate change is continually being captured and updated within the Fleet Corporate Asset Management System (Key2).

At acquisition, all assets are given a provisional replacement date, this represents the anticipated lifespan of the asset. On an ongoing basis the continuing need for the asset is determined via lifecycle management which considers the condition, utilisation, value for money and climate change impact of the asset. This informs whether the asset lifespan should be extended, or the asset replaced or disposed of with no replacement.

This data, and its upkeep and improvement, enables data-led decision making and provides a foundation for PKC's future plans for managing and investing in Fleet assets. Below is a summary of the key findings:

## Condition

Currently 626 (26%) assets have exceeded their planned lifespan, the majority of these are Plant (e.g., Tractors, Drills, Compressors). 1,873 (74%) of Fleet assets are within their agreed lifecycle.

## Utilisation

Utilisation is one of the key factors for assessing how Fleet assets are being used, with data being collected from trackers fitted to all vehicles.

Utilisation is a key driver within the ongoing **Council Vehicle Fleet Utilisation and Optimisation Review 2016/2017**, which continues to reduce the use of private vehicles for business travel and increase the utilisation of existing pool vehicles.

Vehicle tracking and utilisation information is captured in Navman, with a view to linking to Key2. Analysis of this data is used to identify underutilised vehicles. This has increased pool vehicle utilisation to 73%, with recurring savings of around £340K.

The current average utilisation across all asset categorisations is 70.76%, this will be monitored over the duration of this plan.

This plan outlines how we will increase utilisation across the rest of the fleet via implementation of the asset challenge process.

## Value for money

APSE has national value for money benchmarks, however currently not all Scottish Authorities input to these, therefore PKC are developing internal benchmarking for asset lifecycle costs.

Modelling of historic costs per asset type and manufacturer is helping to inform future replacement dates and procurement decisions. This plan outlines how this approach will be further developed to provide internal benchmarking indicators.

## Climate Change

### **Electrification of Fleet – Low Emission Vehicles (August 2020)**

The Scottish Government's 'Switched on Scotland Roadmap' of 2013 sets out a long-term vision to achieve the widespread adoption of LEVs and ultimately to remove

petrol and diesel fueled vehicles by 2030. This transport action plan has clear links with other documents such as Cleaner Air for Scotland, the Scottish Government Climate Change Plan and the Scottish Energy Strategy. In 2019 the Scottish Government announced a requirement to phase out the purchase of all new petrol and diesel cars and small vans from the public sector fleet from 2025.

PKC is working to meet this target, updates to this will be brought through the annual status report.

### Electrification of Plant

There are currently no statutory requirements to decarbonise plant. Fleet is continuing to explore battery operated plant and to research and collaborate with other councils on suitable solutions.

### Compliance

Fleet operations require an operator’s licence, this is the legal authority required to operate goods vehicles in Great Britain and is issued by the Traffic Commissioner. Compliance is managed and scrutinised via Operator Compliance Risk Score (OCRS). This system is based on data collected by the Drive and Vehicle Standards Agency (DVSA) over a 3-year rolling period.

Fleet operations require scheduled inspections:

| Scheduled Inspection Type                                             | Number Annually |
|-----------------------------------------------------------------------|-----------------|
| MOT                                                                   | 333             |
| HGV MOT                                                               | 88              |
| Service                                                               | 840             |
| Inspection (including vehicles, bells and skips, gate checks on HGVs) | 2,146           |
| Total                                                                 | 3,407           |

Fleet operations require adherence to various statutory and best practice guidance, including:

Risk Assessments, Health & Safety work Acts, creation and adherence to safe systems of work, Hand Arm Vibration (HAVS), Provision and Use of Work Equipment Regulations 1998 (PUWER), Lifting Operations and Lifting Equipment Regulations 1998 (LOLER)– vehicle and plant & Control of Substances Hazardous to Health (COSHH).

Fleet is currently working towards joining the Earned Recognition Scheme (DVSA accreditation), which enables further real-time compliance monitoring.

### Maintenance

Maintenance of fleet assets is split into 2 workstreams:

|                            |                                                                    |
|----------------------------|--------------------------------------------------------------------|
| <b>Planned Maintenance</b> | Planned Maintenance includes inspections, servicing and MOTs       |
| <b>Reactive Repairs</b>    | Reactive Repairs include defects, breakdowns and accidental damage |

## Cost of the Fleet asset

Detailed financial information relating to the cost of the Fleet is captured and updated within Key2 and via financial monitoring, below is a summary of key information:

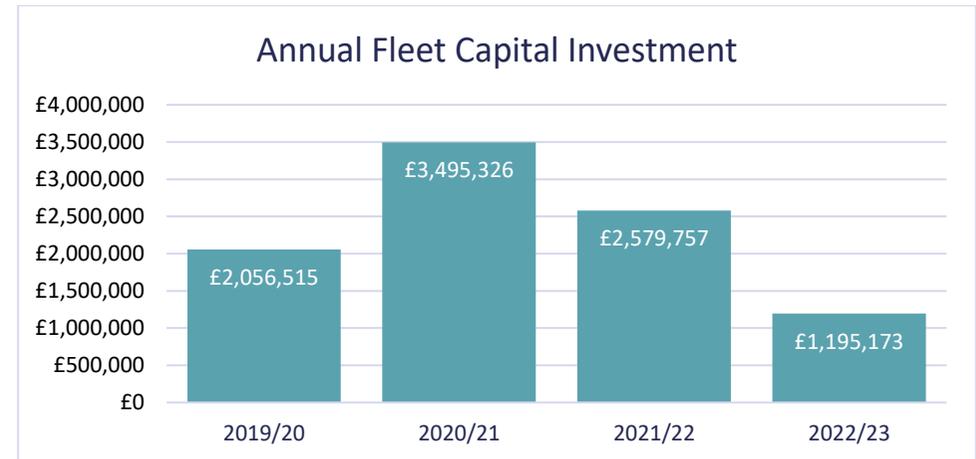
### The Investment Blueprint

In 2021 Perth & Kinross Council approved the Investment Blueprint, which sets out the rationale and key drivers for change. It provides five overarching principles to inform decision-making and direct the investment of public money where it is most needed. The principles are, that our investment decisions must: -

- mitigate against the impact of climate change
- promote inclusive economic growth and a vibrant community
- promote equality and
- support the delivery of sustainable public services through effective management of our assets
- promote and enhance digital inclusion

The Blueprint's function is to identify future investment priorities and to establish a more transparent and flexible approach to investment decision-making, ensuring that capital investment decisions support corporate objectives and priority outcomes.

## Capital



Over the last three years there has been a marked decrease in Fleet Capital expenditure. This is due to the ongoing impact of Covid-19 on the availability of vehicles and parts, this continues to be significantly impeded.

### 6-Year Funded Capital Programmes

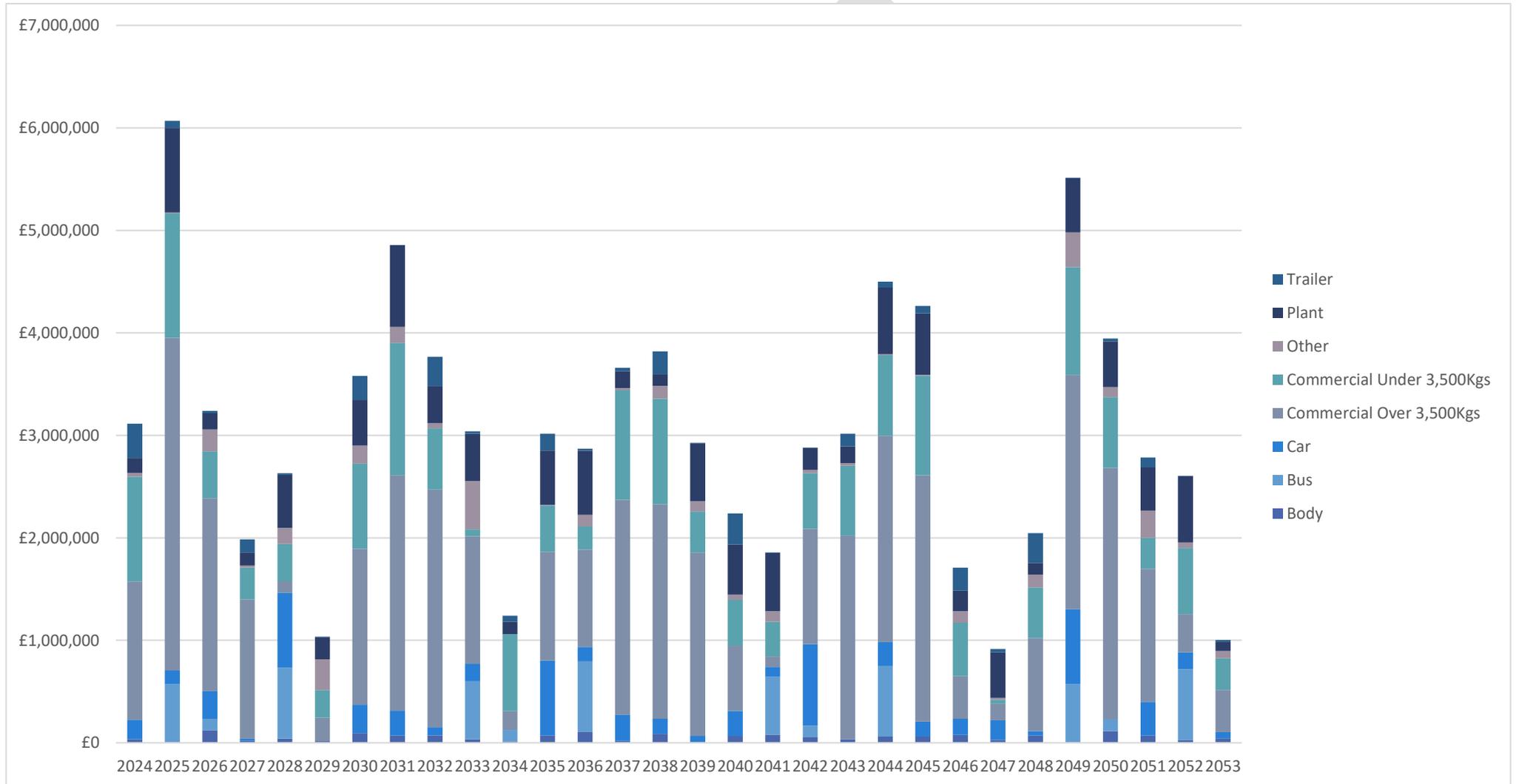
| Named Programmes            | Purpose                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fleet Replacement Programme | The vehicle replacement programme is based on predicted vehicle usage over a period of time or age. Vehicles that reach the vehicle replacement criteria are listed for review and asset challenge, and the results are collated to form the capital bid. The criteria ensures that best value is obtained by replacing the asset at the optimum time. |

This established programme is regularly reviewed to update lifecycles as required.

### 30-Year Fleet Investment Plan

To enable investment planning beyond the 6-year funded programme, a 30-year fleet investment plan has been established based upon lifecycle planning of the current asset base. Its purpose is to provide an overview of the asset and projected investment requirements, net of inflationary increases.

The plan projects a potential £90,138,729 investment required over 30 years (2024-2053) to maintain the status quo and current asset provision, this is illustrated in the following chart.



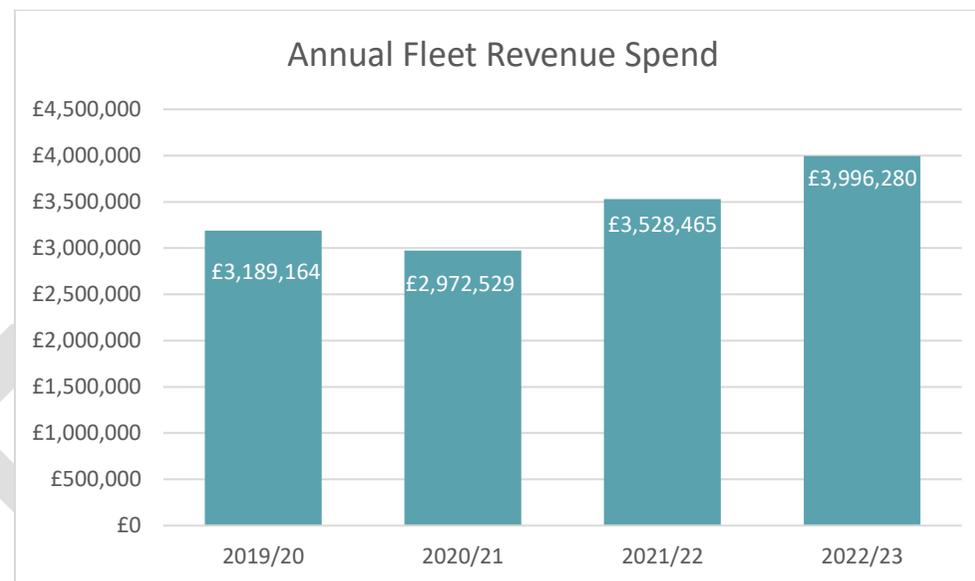
## Revenue

Fleet revenue expenditure is illustrated in the tables below. Total revenue expenditure for 2022/2023 was **£3,996,280**.

| Cost Type                                                                             | Cost (£)         |
|---------------------------------------------------------------------------------------|------------------|
| Vehicle Insurance Premiums                                                            | 268,000          |
| Vehicle Trackers                                                                      | 36,264           |
| Fuel (Carbon and non-carbon)                                                          | 1,599,761        |
| Maintenance Service Contracts                                                         | 169,685          |
| Other Transport Costs e.g. Road Fund, Driving Licence Checks, First Registration Fees | 109,242          |
| <b>Maintenance</b>                                                                    | <b>1,813,327</b> |

Maintenance costs can be further split into asset classification:

| Asset Classification                                          | Maintenance Cost 2022/23 (£) |
|---------------------------------------------------------------|------------------------------|
| Car                                                           | £137,958                     |
| Commercial over 3.5 tonne                                     | £954,381                     |
| Commercial under 3.5 tonne                                    | £245,976                     |
| Demountable Body                                              | £66,243                      |
| Minibus                                                       | £2,992                       |
| Other e.g. Skips, Recycling Bells, Containers & Vehicle Ramps | £28,905                      |
| Plant                                                         | £261,221                     |
| Trailer - semi & towed                                        | £115,651                     |
|                                                               | <b>£1,813,327</b>            |



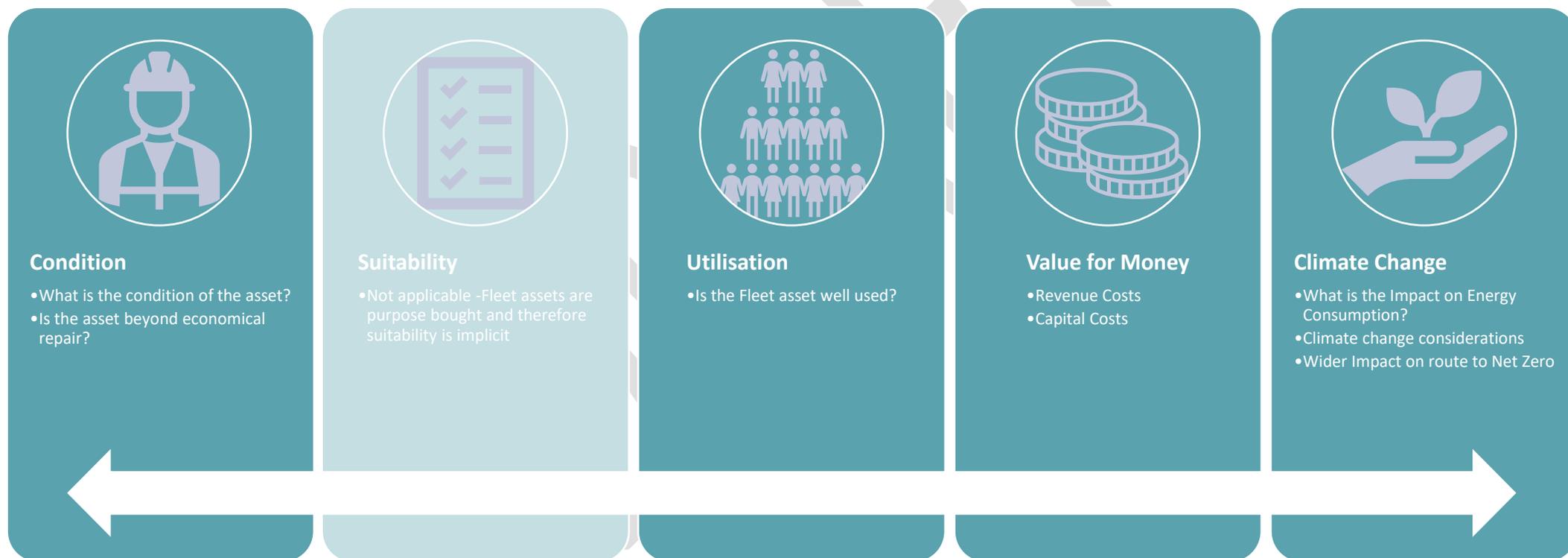
Consistent annual increases are expected as a result of inflation (RPI, general labour rate), while ongoing global uncertainties related to vehicle part supply and fuel prices are also influencing revenue expenditure.

## How We Will Inform Investment – Asset Challenge

In line with our Corporate Asset Management Strategy, and related principles, we will ensure that investment within the Fleet asset is effectively targeted via the undertaking of an assessment and challenge of all Fleet assets:

- as a key part of annual benchmarking
- as a key part of the annual capital budget process
- as a key part of the annual revenue budget process

This process will be applied as outlined below:



## Using the Asset Challenge Model

Any proposals that require investment, such as significant maintenance or end of lifecycle replacement, will prompt an **Asset Challenge**. Prior to progressing any investment requests, data will be collated and reviewed to ensure that the proposed course of action is the best method to meet the service need.

Annual monitoring and review of Fleet assets will be completed to ensure that they meet agreed standards:

| Asset Classification      | Asset Type             | Condition<br><br>(Lifecycle - years) | Utilisation<br> | Value for Money<br>                                    | Climate Change<br>                                                                                                                                                    |  |                                                                                                                  |
|---------------------------|------------------------|-----------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|------------------------------------------------------------------------------------------------------------------|
| Car                       | Cars - electric        | 4                                                                                                                     | Minimum 75%                                                                                       | Value for money is assessed based on internal benchmarking against median asset costs and proposals assessed on Service Delivery Outcomes | From 2025 all new public sector fleet must be electric, purchase of diesel/petrol will not be permitted<br><br>The LEV Fleet Strategy outlines PKC's plan for converting the fleet alongside the fleet decarbonisation and infrastructure road map study |  |                                                                                                                  |
|                           | Cars – diesel          | 7                                                                                                                     | Minimum 75%                                                                                       |                                                                                                                                           |                                                                                                                                                                                                                                                          |  |                                                                                                                  |
|                           | Land Rovers            | 15                                                                                                                    | Minimum 75%                                                                                       |                                                                                                                                           |                                                                                                                                                                                                                                                          |  |                                                                                                                  |
|                           | 4x4 Vehicles           | 5                                                                                                                     | Minimum 75%                                                                                       |                                                                                                                                           |                                                                                                                                                                                                                                                          |  |                                                                                                                  |
| Commercial Under 3,500Kgs | Panel Van<br>Small Van | 7                                                                                                                     | Minimum 75%                                                                                       |                                                                                                                                           |                                                                                                                                                                                                                                                          |  | From 2030 all new HGV public sector fleet must be zero emission, purchase of diesel/petrol will not be permitted |
|                           | Van Derived MPV        | 6                                                                                                                     | Minimum 75%                                                                                       |                                                                                                                                           |                                                                                                                                                                                                                                                          |  |                                                                                                                  |
|                           | Luton Van              | 6                                                                                                                     | Minimum 75%                                                                                       |                                                                                                                                           |                                                                                                                                                                                                                                                          |  |                                                                                                                  |
|                           | Pickup                 | 5                                                                                                                     | Minimum 75%                                                                                       |                                                                                                                                           |                                                                                                                                                                                                                                                          |  |                                                                                                                  |
|                           | Tipper                 | 6                                                                                                                     | Minimum 75%                                                                                       |                                                                                                                                           |                                                                                                                                                                                                                                                          |  |                                                                                                                  |
|                           | Pavement Sweeper       | 4                                                                                                                     | Minimum 75%                                                                                       |                                                                                                                                           |                                                                                                                                                                                                                                                          |  |                                                                                                                  |
|                           | Road Sweeper           | 4                                                                                                                     | Minimum 75%                                                                                       |                                                                                                                                           |                                                                                                                                                                                                                                                          |  |                                                                                                                  |

|                                   |                                           |    |                                                                              |
|-----------------------------------|-------------------------------------------|----|------------------------------------------------------------------------------|
| <b>Commercial over 3.5 tonnes</b> | 12 tonne Curtain-Sider Lorry              | 8  | Minimum 75%                                                                  |
|                                   | 7.5-10 tonne Tipper                       | 6  | Minimum 75%                                                                  |
|                                   | Arctic Unit                               | 7  | Minimum 75%                                                                  |
|                                   | Food Lorry (Commercial)                   | 6  | Minimum 75%                                                                  |
|                                   | Hiab Lorry                                | 7  | Minimum 75%                                                                  |
|                                   | Hooklift 4 axle truck                     | 6  | Minimum 75%                                                                  |
|                                   | Hooklift 2 axle truck                     | 5  | Minimum 75%                                                                  |
|                                   | Refuse Collection Vehicles                | 6  | Minimum 75%                                                                  |
|                                   | Skip Loaders                              | 7  | Minimum 75%                                                                  |
|                                   | Road Sweepers                             | 5  | Minimum 75%                                                                  |
|                                   | Tipper >3.5 tonnes                        | 6  | Minimum 75%                                                                  |
|                                   | Panel Vans >3.5 tonnes                    | 10 | Minimum 75%                                                                  |
| <b>Demountable Body</b>           | Flat Bed, Cage, Cage with Side Lifter,    | 5  | Assets not fitted with trackers – Utilisation monitored when asset inspected |
| <b>Minibus</b>                    | Mobility Minibus & Minibus with Towbar    | 8  | Minimum 75%                                                                  |
| <b>Trailer</b>                    | Bulk Ejection & Tipping Trailers          | 8  | Assets not fitted with trackers – Utilisation monitored when asset inspected |
|                                   | Agricultural Tyre Crusher<br>Water Bowser | 10 |                                                                              |

|              |                                                                                                                        |    |                                                                                                      |  |  |
|--------------|------------------------------------------------------------------------------------------------------------------------|----|------------------------------------------------------------------------------------------------------|--|--|
|              | 1 Axle Trailer Less than 1020 Kg<br>1 Axle Trailer Less than 750 Kg<br>Woodchipper<br>2 Axle Trailer Less than 1020 Kg |    |                                                                                                      |  |  |
| <b>Other</b> | Bell                                                                                                                   | 20 | Assets not fitted with trackers –<br>Utilisation monitored when asset inspected                      |  |  |
|              | Skip                                                                                                                   | 10 |                                                                                                      |  |  |
|              | Coffin Lowering Device                                                                                                 | 20 |                                                                                                      |  |  |
|              | Storage Container                                                                                                      | 20 |                                                                                                      |  |  |
|              | Vehicle Ramp, Ramp Air Jack                                                                                            | 25 |                                                                                                      |  |  |
|              | Straps                                                                                                                 | 10 |                                                                                                      |  |  |
|              | Hoist                                                                                                                  | 25 |                                                                                                      |  |  |
| <b>Plant</b> | Tractor >100hp                                                                                                         | 8  | Minimum 50%                                                                                          |  |  |
|              | Tractor <35hp                                                                                                          | 10 | Minimum 50%                                                                                          |  |  |
|              | Mower, Strimmer, Polesaw, Compressor, Battery Booster, Chainsaw                                                        | 4  | Assets not fitted with trackers<br><br>Assets under ongoing review to increase equipment sharing and |  |  |

|                                                                   |    |                                    |
|-------------------------------------------------------------------|----|------------------------------------|
| Ride on Mower,<br>Hedge Trimmer, 5<br>Gang Mower, 7<br>Gang Mower | 5  | move away from specific allocation |
| Powered Sweeper,<br>Generator, Leaf<br>Blower,                    | 6  |                                    |
| Side Arm Flail,<br>Trailed Aerator, 3<br>Gang Mower               | 7  |                                    |
| Trailed Leaf<br>Vacuum, Motorised<br>Dumper                       | 8  |                                    |
| Salt Spreader, Pitch<br>Liner, Rotovator,<br>Pallet Truck,        | 10 |                                    |
| Compactor                                                         | 18 |                                    |
| Fuel Pump                                                         | 30 |                                    |

Once the Asset Challenge is complete Fleet Management will determine whether the asset is required, should be replaced or if replacement can be deferred.

Assets which are surplus to requirements will be re-allocated, utilised as pool assets or disposed of in line with Fleet Management Disposal Procedures.

## How We Will Inform Investment – Adherence to Strategic Principles

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The following pages are grouped into the five strategic principles set out within the Fleet Asset Management Strategy. They provide context and specific background information which has been used to create an action plan:

1. Establish an affordable and sustainable Fleet management model
2. To utilise fleet assets efficiently and effectively
3. Undertake proactive, preventative maintenance based on lifecycle planning
4. Commit to decarbonising fleet operations through effective planning and investment
5. Ensure that fleet assets are operated in a safe, and environmentally conscious manner, to protect drivers and the public

The document concludes with a Key Strategic Objectives Action Plan, which defines the key strategic objectives over the next 6 years.

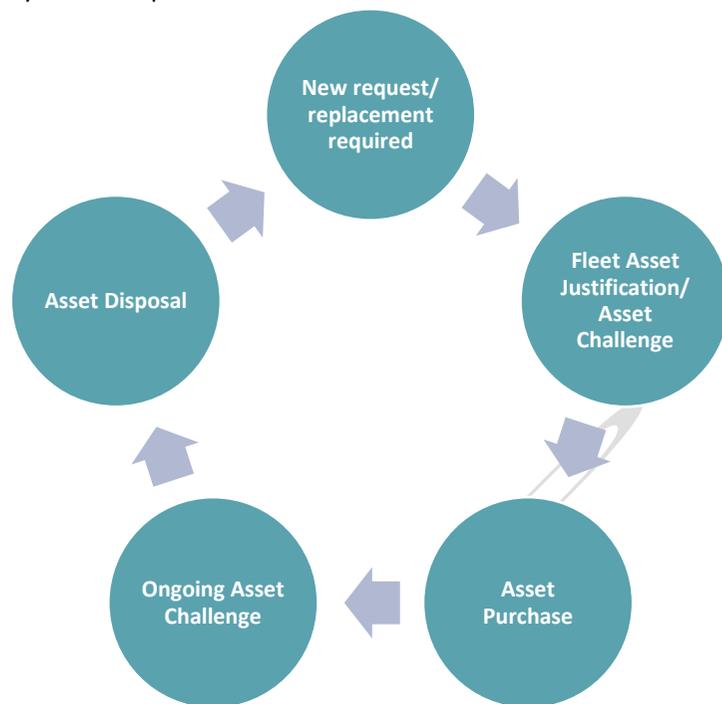


*Principle 1: Establish an affordable and sustainable Fleet management model*

**Manage all of our Fleet Assets as corporate assets:** To ensure that Fleet Assets are managed corporately the Council needs to adopt a centralised fleet management model, where Fleet can make investment decisions regarding all fleet assets.

**Update & create Service Level Agreements (SLAs) that inform the need, location and future fleet asset requirements:** The success of a corporate approach relies on a clear and mutual understanding of Service's Fleet requirements. To facilitate this Fleet will work alongside services to create or update SLAs to inform the need, location and, where possible, project future fleet asset requirements. This shared, and flexible, approach will ensure that asset requirements are met and minimise the purchase/lease or maintenance of vehicles/plant that are surplus to need.

This approach builds on the existing Fleet Asset Justification Process, which will be integrated with the Asset Challenge process as a mandatory step prior to the purchase of any new or replacement assets.



The success of this corporate approach has been demonstrated via the Council Vehicle Fleet Utilisation and Optimisation Review 2016/2017, and extending this approach to service-specific vehicles will enable effective asset challenge and informed investment decisions, further rationalising the fleet.

**Continue to procure at best value for costs relating to fleet asset acquisition, operation, and maintenance:** Fleet will continue to utilise approved procurement routes to market to obtain compliant pricing and contract terms. Asset requirements will be used to inform relevant procurement strategies e.g., leasing, purchasing, or outsourcing, depending on the specific needs and cost considerations. By continuing to optimise procurement practices, Fleet will ensure cost-effectiveness throughout the entire lifecycle of our fleet assets.

**Continue to complete reviews of all fleet assets' condition, utilisation, value for money and climate change data to enable effective asset challenge:** Fleet have been working in collaboration with the Capital Investment and Asset Management Team (CIAM) to collate and store asset related data within Key2. Both teams will continue to collaborate and work with Key2 to continuously improve the quality, volume and versatility of this data.

**Continue to drive down grey fleet costs via data monitoring and asset rationalisation and seek savings to be directly reinvested in fleet improvement:** Fleet will continue to focus on reducing the use of grey fleet assisted by the Pool Booking System and ongoing efforts to re-allocate under-utilised vehicles into the pool. Fleet are also working to establish additional vehicle pick-up points around Perth and Kinross.

Currently, where savings are made via reductions to grey fleet expenditure, the savings are retained by the Services.

This plan proposes that these savings be retained by Fleet and invested in ongoing improvement of the pool fleet and related infrastructure.

This will be progressed via the appropriate forums to ensure the same availability and quality of vehicle provision is maintained as the pool fleet expands to include more service divisions.

**Implement a Tyre Policy to inform how we procure, replace, and dispose of tyres and requirements for winter tyres across asset types:** To minimise workshop duration and storage requirements, it is necessary to re-evaluate our approach to

winter tyres for our vehicles. In recent times, Fleet has moved away from alternating regular and winter tyres via the adoption of All-Season tyres. There is a requirement for the creation of a Tyre Policy to define the agreed lifecycle of tyres and ensure a seamless transition from winter tyre replacements to all-weather solutions.



**Incorporate our Fleet Replacement programme into the 6-year funded programme and 30-year Investment Plan:** To ensure a long-term and sustainable approach to fleet management, we will integrate our Fleet Replacement programme into the overall strategic investment planning process.

## Principle 2: To utilise fleet assets efficiently and effectively

The utilisation of vehicle and plant assets cannot reach 100% due to the need for both planned and unplanned maintenance, and the related necessity of spare assets to avoid operational interruptions.

Fleet is responsible for managing the maintenance workload to minimise vehicle downtime and maximise availability, and therefore utilisation of assets.

**Continue to conduct need assessment to evaluate key fleet and equipment requirements to optimise operational delivery:** To ensure alignment between existing Fleet assets and operational need and minimise service delivery disruptions caused by asset downtime, Fleet conduct key needs assessments as part of the process of creating and updating SLAs. These assessments analyse current and projected demand, evaluating the suitability of existing assets, and identifying any gaps or inefficiencies. These are also used to identify and prioritise key assets, informing contingency plans and necessary level of asset requirements, including spares.

**Continue to manage the spare pool and extend vehicle lifecycles by rotating vehicle usage:** Within existing maintenance and contingency plans, Fleet oversees the spare pool and ensures uniform wear and tear across asset types via rotational management. All assets, including spares, are subject to the established Asset Challenge process and are carefully monitored to ensure the fulfilment of service needs while preventing under-utilisation of assets. Balancing these factors is complex, and where high-value assets are involved, Fleet adopts a pragmatic approach to the number of spare assets and staggers replacement dates to evenly distribute capital investment needs.

**Establish utilisation benchmarks for all vehicles to inform asset lifecycle management:** As part of the creation of this document Fleet have established high-level utilisation benchmarks for all vehicular asset types. These will be refined over the duration of the plan to further inform asset lifecycle management.

These benchmarks will serve to define expected utilisation percentages and provide a baseline for evaluating asset performance and efficiency. By monitoring actual utilisation against these benchmarks, Fleet will identify under or over-utilised assets,

prompting an Asset Challenge. This approach ensures that resources are allocated optimally, reducing unnecessary costs and maximising the value of our fleet assets.

Plant equipment cannot have asset trackers installed; therefore utilisation is not currently measured with the same accuracy as vehicular assets. The majority of plant equipment is allocated to operational teams and is replaced as it fails or reaches the end of its lifecycle (due to Hand Arm Vibration requirements most is replaced every 3-4 years).

**Ensure that operational teams are reviewing allocated equipment lists against what has been issued:** Fleet will implement a process with Operations to ensure that operational teams regularly review their allocated equipment lists against the assets that have been issued to them. This process helps maintain accurate asset records and ensures that operational teams have the necessary resources to fulfil their duties effectively.

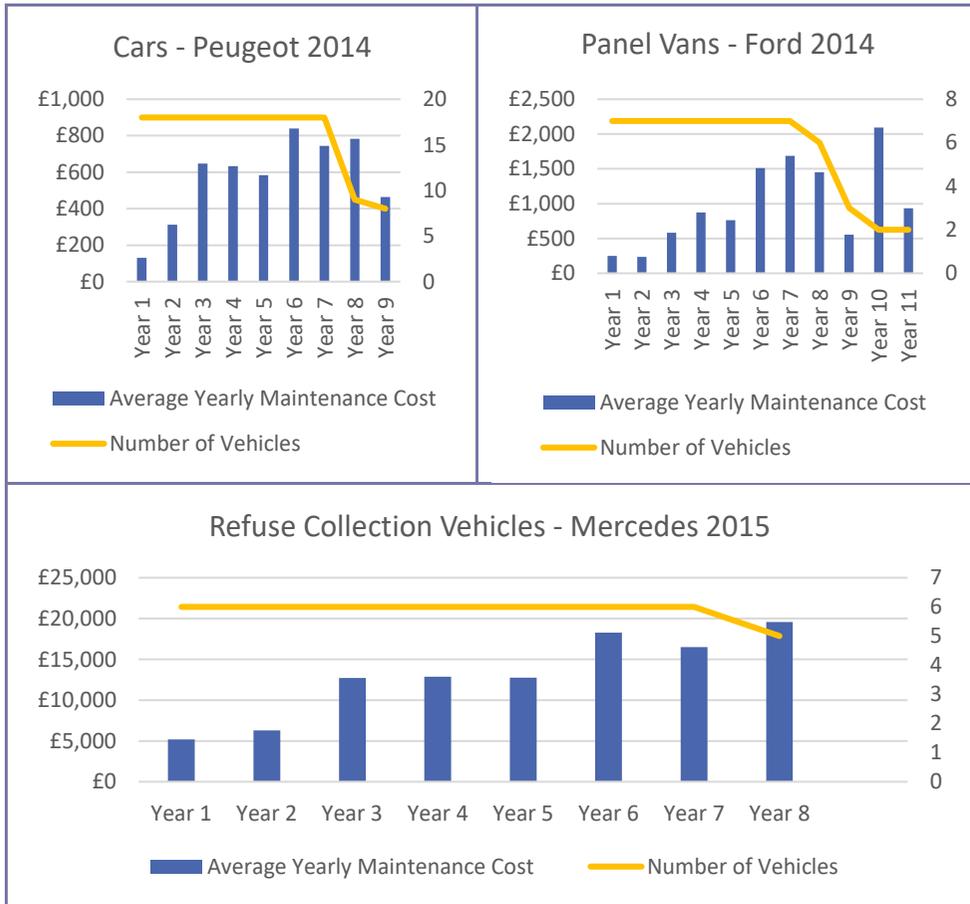
By maintaining an updated inventory, Fleet can expand the asset challenge process to include plant assets. Fleet will begin by working with Direct Services to review allocated equipment lists and scheduled works to identify opportunities for efficiency gains across teams. Instead of each team carrying a full set of equipment in their vans, we can promote equipment sharing between larger groups. This means loading equipment only when it is required for that day's work.

Implementing this approach eliminates the need for duplicate assets, enabling Fleet to rationalise the plant pool. This will further serve to increase the utilisation of retained assets as they can be shared among multiple teams. By optimising equipment utilisation, Fleet can reduce costs, minimise the number of underutilised assets, and make more efficient use of available resources.

## Principle 3: Undertake proactive, preventative maintenance based on lifecycle planning

Monitoring, setting and reviewing the lifecycle for each Fleet asset type is essential to ensure efficient management of assets. Fleet has an established systematic approach to asset lifecycle management, which is formalised within Key2 to optimise asset utilisation, reduce operational costs and inform decisions regarding asset maintenance and disposal.

**Monitoring:** Fleet currently hold data on vehicular asset usage and maintenance spend. This has been used to plot average maintenance costs per specific asset type to inform future suitability of assets and project their replacement date:



**Setting the lifecycle:** As per the asset challenge table, the projected lifecycle for these assets is:

| Asset Type                 | Projected lifespan |
|----------------------------|--------------------|
| Cars                       | 7                  |
| Panel Vans                 | 7                  |
| Refuse Collection Vehicles | 6                  |

From the charts we can see that some of these assets are currently beyond their projected replacement date, these assets are challenged prior to non-routine works to ensure ongoing investment is appropriate.

**Reviewing the lifecycle:** This exercise was initially completed in 2019 and updated in 2023 to take individual asset condition and mileage into consideration. Fleet will re-complete this annually to include new asset types and changes to usage. The evaluation of this data is presently being reviewed, with the aim being to optimise and streamline the process.

Data gathered through this exercise informs lifecycle planning alongside corporate objectives, service level agreements, asset compliance and other asset specific data held around condition, utilisation and climate impact.

**Monitoring and Reviewing Inspection Frequencies:** Alongside lifecycle planning the monitoring the review of inspection frequencies is essential for effective asset management. Car assets have manufacturer guidelines which determine appropriate service intervals, and our Operator Licence sets HGV requirements. These guidelines provide initial recommendations which are considered alongside asset-specific data to inform inspection frequencies. Adherence to these inspection frequencies ensures timely inspections, reduces the risk of vehicle failures, optimises maintenance efforts and extends asset lifespan.

To ensure continuous improvement Fleet will review inspection results, alongside usage and maintenance to adjust frequencies, to refine maintenance strategies, either increasing or reducing them as required, within the limits of statutory compliance.

Principle 4: Commit to decarbonising fleet operations through effective planning and investment.

**We will continue to work with Transport Scotland, Tactran Working Group, Switched on Fleets and Energy Saving Trust to explore future fuel options and innovations:** Collaborating with these organisations allows us to stay abreast of innovations, guidelines, regulations and ensures we are aware of any financial or other assistance.



Via active participations in discussions, research, and initiatives we can evaluate emerging technologies and fuels that have the potential to reduce carbon emissions and enhance the sustainability of our fleet operations. This ongoing collaborative approach enables us to make informed decisions regarding the adoption of new options, as they become viable and commercially feasible.

**Continue to focus funding on establishing electric vehicle infrastructure to support a fully decarbonised fleet:** To ensure the smooth post 2025 transition to small fleet electric vehicles (EVs) and to meet PKC's decarbonisation goals, Fleet will continue to allocate available funding and resources towards the development and expansion of EV charging infrastructure. Via investment in charging stations and related infrastructure, PKC is aiming to create the necessary support to facilitate widespread adoption of EVs within our fleet.

**Confirm management arrangements for electrical charging infrastructure:** To effectively manage our electric charging infrastructure, Fleet will assist in the establishing of clear policy and procedure in relation to the lifecycle of these assets. Defining responsibilities for installation and ongoing maintenance and operation of charging stations, as well as ensuring proper protocols for monitoring usage, handling customer enquiries, and handling billing and payment processes will require policy decisions to be made. Key parts of this process are the capturing and storing of existing asset data in an appropriate system and the ongoing updating and monitoring of this.

**Continue to collate information on the existing carbon footprint of our fleet operations and identify areas for improvement:** Fleet will maintain the current approach to tracking and analysing the carbon footprint of Fleet operations. This involves the ongoing collation and reporting on fuel consumption, mileage and emissions. We will work with the Climate Change and Sustainable Development Team to assess Fleet's environmental impact and identify areas where improvements can be made.

**Investigate moving away from asset purchasing and lease electric vehicles from 2025:** As part of our post-2025 carbon reduction measures Fleet will investigate shifting the procurement strategy away from asset purchasing and instead lease electric vehicles. Leasing EVs allows access to the latest technologies and ongoing advancements in electric vehicle capabilities. Leasing also mitigates the risks associated with owning rapidly evolving assets and provides flexibility in fleet management, enabling PKC to adapt vehicle choices based on evolving needs and advancements in non-carbon vehicle technology.

**Continue to upskill the workforce to ensure we can maintain electric vehicles:** Effective maintenance of electric vehicles necessitates specialised knowledge and skills. To ensure ongoing readiness for the change to EVs, Fleet will continue to invest in workforce training to ensure the necessary expertise in handling, servicing, and maintaining electric vehicles. By ensuring we have this knowledge and skills Fleet can effectively manage future maintenance and repair needs.

**Begin to assess the requirements for decarbonisation of small plant and equipment:** Fleet will initiate an assessment process to understand the specific requirements for decarbonisation of non-vehicular assets. This assessment will involve evaluating the current equipment, identifying alternative low-carbon technologies or fuels, and considering feasible strategies for reducing emissions.

By extending our decarbonisation efforts beyond fleet vehicles to include small plant and equipment, Fleet can achieve a more comprehensive and sustainable approach to our operations.

Principle 5: Ensure that fleet assets are operated in a safe and environmentally conscious manner, to protect drivers and the public

**Continue to comply with Operator Licence requirements:** Fleet will continue to maintain strict compliance with all Operator Licence requirements. This includes adhering to regulations regarding vehicle maintenance, driver hours, vehicle inspections, record-keeping amongst others. By upholding these requirements, PKC ensures the safety, legality and reliability of our operations, while also promoting responsible fleet management practices.

**Work towards achieving Driver & Vehicle Standards Agency (DVSA) Earned Recognition Scheme:** One of Fleet's longer-term goals is to achieve the DVSA Earned Recognition Scheme. This voluntary program allows the demonstration of PKC's commitment to maintaining high standards of vehicle and driver compliance. Attainment of recognised status provides benefits in the form of reduced roadside inspections and improved efficiency in compliance monitoring processes.

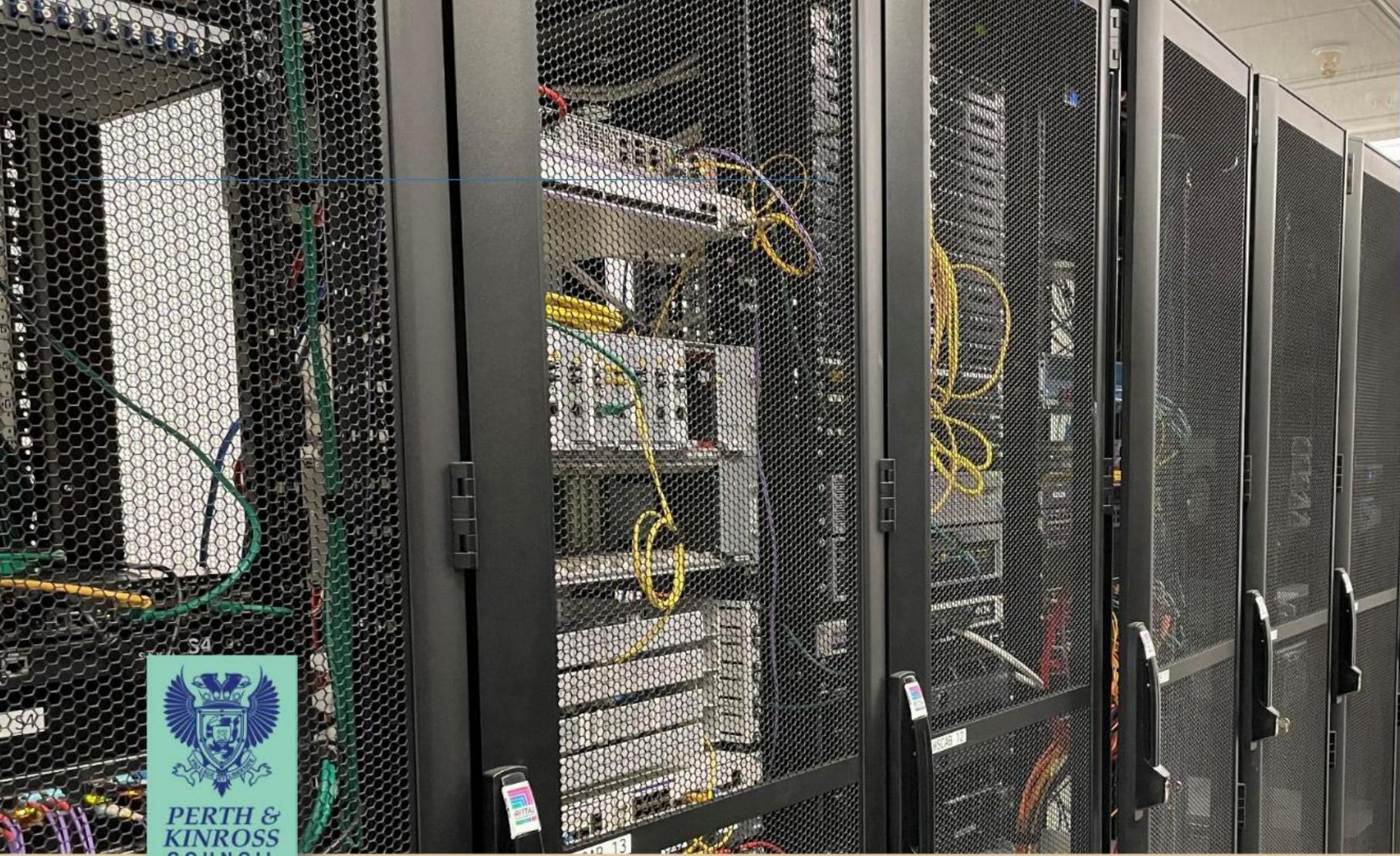
**Continue to carry out all statutory servicing and maintenance:** Fleet will continue to prioritise and fulfil all statutory servicing and maintenance requirements for vehicles and plant. This includes the ongoing adherence to manufacturer-recommended service schedules, conducting routine inspections, and prompt resolution of any highlighted remedial works from these. By proactively maintaining our vehicles in accordance with statutory and manufacturer guidelines, we ensure their optimal performance, safety and longevity.

**Continue to monitor vehicle idling times and ensure adherence to policy:** The reduction of vehicle idling times is an essential, and simple to implement, aspect of our commitment to environmental sustainability. Fleet will continue to actively monitor vehicle idling times and report unnecessary idling. By promoting responsible driver behaviour and raising awareness about the impact of idling on fuel consumption, emissions and air quality, we can reduce our environmental footprint and improve operational efficiency.

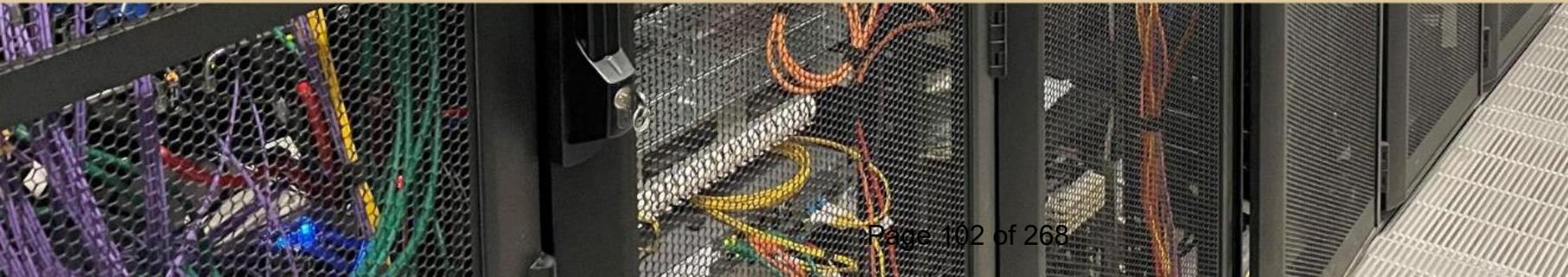
**Continue to record relevant training and compliance information within Key2, the approved corporate system:** Fleet maintain accurate and up-to-date records of training and compliance information within our approved corporate system, Key2. This includes training records, licence details, vehicle inspection information, maintenance records and other compliance-related data. This centralised system ensures the accessibility, integrity and traceability of crucial information facilitating effective compliance monitoring, audits and related reporting.

**Continue to participate in Association of Public Service Excellence (APSE) and Logistics UK working groups:** Fleet will continue to actively participate in these working groups. Engagement within these forums ensures Fleet stays informed about best practices, regulatory updates, emerging technologies and industry trends. This involvement allows Fleet to continuously improve operations via enhancing compliance and awareness and adoption of evolving standards and requirements.

Adherence and ongoing efforts to improve this principle demonstrates Fleet's commitment to operational excellence, regulatory compliance, environmental sustainability and continuous improvement in fleet management practices.



ICT & Digital Asset Management Strategy



## Strategy Introduction

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For the purpose of asset management planning the ICT & digital asset covers:

- **ICT (Information and Communication Technology)**  
Digital foundations, tools, technologies, devices.
- **Digital**  
Our wider culture and approaches for using new tools and technologies to change the way we deliver our services.
- **Data**  
The information we capture; how we keep it secure and share it; and how we use it.

The Council relies on sound IT and digital foundations for delivering services, collaborating effectively, and sharing information safely. Continued investment in digital solutions, information technology, data and skills is a critical strategic enabler for transforming the organisation and keeping our data secure.

Assets in this context are no longer just metal boxes: our concept of ICT and digital assets encompasses a range of things that hold value for the Council.

Technology never stands still. In order to deliver a sound, secure, well-maintained ICT infrastructure we must innovatively adopt and implement emerging technologies for a fit for the future digital environment.

This ICT & Digital Asset Management Strategy and related plan adhere to the overarching approach articulated within the **Corporate Asset Management Framework (CAMF)**.

The CAMF provides an organisational approach to asset management via corporate adherence to the following asset management principles, as informed by those approved by the Strategic Planning and Resources Committee in November 2018:

- All assets are considered as being corporate
- Assets will be identified, accurately recorded and managed via appropriate systems, to ensure they are as accessible as possible to all services/service users
- Assets will be safe, statutorily compliant, and economically and environmentally sustainable
- Where appropriate, benchmarks will be established and assets reviewed against these to aid investment planning
- The utilisation of assets will be maximised, meet communities' needs and support future service delivery.

This document is supported by existing strategies and policies including:

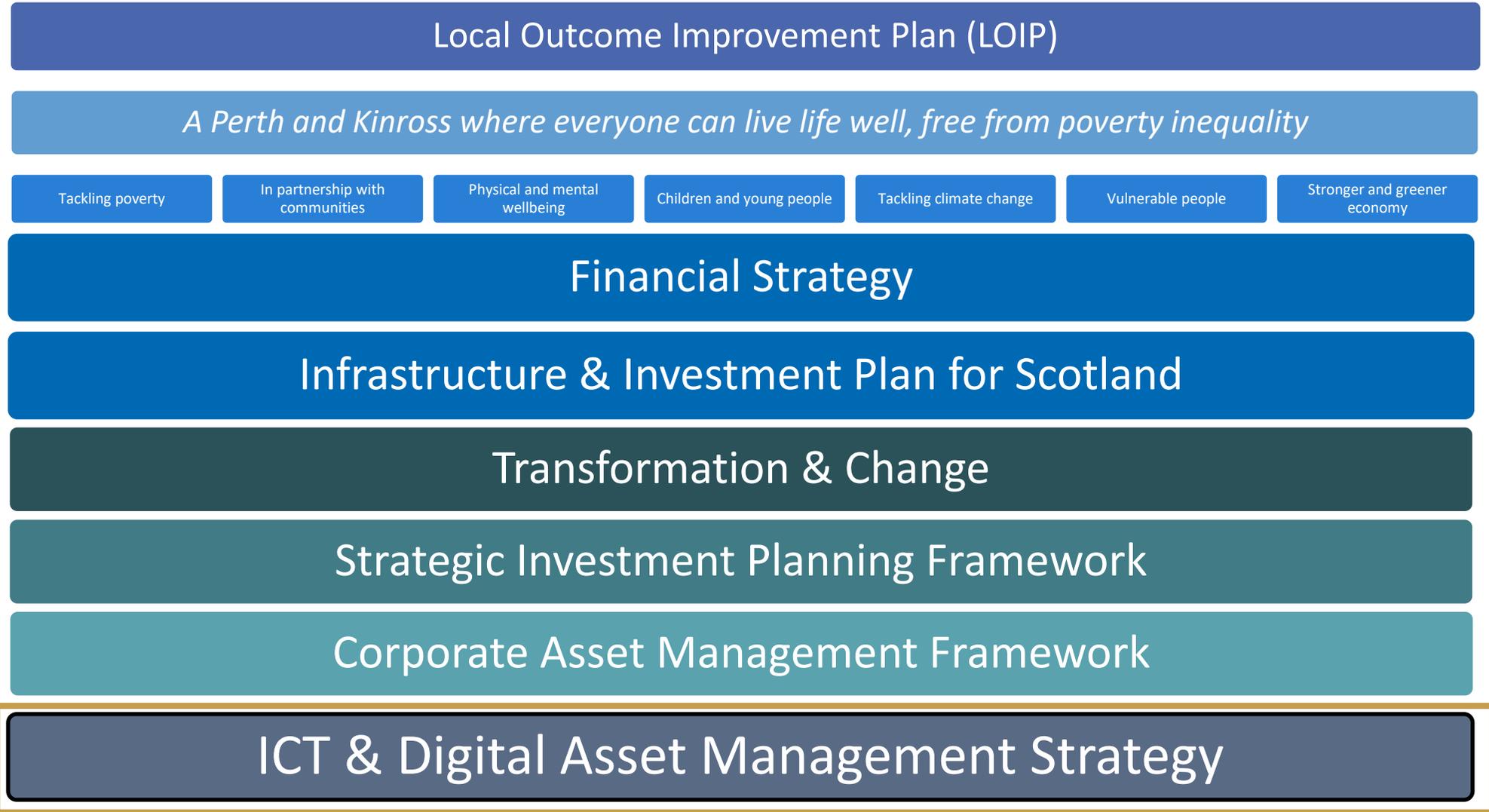
- Digital Perth & Kinross: Digital Strategy 2023 – 28
- ECS Digital Learning Strategy
- Climate Action Plan

This strategy is underpinned by:

- A Changing Nation: How Scotland will Thrive in a Digital World – Scottish Government Digital Strategy 2021. This national Strategy sets out measures for ensuring Scotland will fulfil its potential in a constantly evolving digital world.

There is a “golden thread” that connects this ICT & Digital Asset Management Strategy to the overarching Community Plan (Local Outcome Improvement Plan) vision of “A Perth and Kinross where everyone can live life well, free from poverty inequality”

This thread is illustrated below:



## Vision & Principles

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Our ICT & Digital asset management vision and the aim of this ICT & Digital Asset Management Strategy is:

**“Building from sound and secure digital foundations: ensuring the Council’s ICT and digital assets are effectively managed, throughout their lifecycles, to achieve the best possible outcomes and value for the people who use our services and the employees who deliver them”**

The Strategy is designed to provide a coherent and structured approach to ICT and digital asset management; underpin PKC’s investment decision making around procurement, support and replacement; and deliver improved operational efficiency and enhanced service delivery.

In support of this vision, and adherence to the CAMF, six strategic principles have been established to guide decision-making and effective ICT and digital asset utilisation:

1. Ensure our digital foundations are optimised, secure, maintained and fit for the future
2. Secure our information assets: prioritising safety of our information by investing to stay ahead of cyber security threats
3. Manage our data assets, and use them to derive business intelligence and insights for better outcomes for people and communities
4. Build and embed “One Council” standards and approaches for the Council’s application and business systems landscape
5. Evolve fit for the future digital classrooms to help our children and young people achieve their full potential
6. Contribute to the Council’s net zero commitments

## Challenges and Actions

These Strategic Asset Management Principles adhere to the guiding principles of the Corporate Asset Management Framework and guide the ICT & Digital Asset Management Plan:

### Principle 1: Ensure our digital foundations are optimised, secure, maintained and fit for the future

#### THE CHALLENGES:

- ICT and digital assets are complex, integrated, dispersed, constantly changing, and under multiple ownership; they require continuing development and investment
- The sophistication, reach and impact of digital technologies requires fundamental change in how we acquire; monitor and plan assets
- Hybrid working has significantly increased the volume of ICT and digital assets in use and our reliance on digital technologies
- Overheads to ensure key systems / infrastructure have effective manufacturer support and are security patched to the latest level have increased: this can lead to re-prioritisation of other planned work
- Increasing / competing demands are impacting ICT and digital asset management activities
- The market is increasingly moving away from traditional perpetual licences towards subscription models and cloud only options

#### WE WILL:

- Continue to deliver and refine ICT network, infrastructure and computer replacement programmes / approaches to meet evolving needs
- Evolve digital workplace and device standards in line with corporate ambitions
- Develop our vulnerability and patch management strategies to ensure these are efficient and reflective of best practice
- Horizon-scan / identify new technologies for helping us work more digitally, innovatively and efficiently
- Evolve our data storage, back up assets and disaster recovery capabilities to keep Council information safe and secure
- Continue to nurture IT talent, skills and expertise via Development roles and programme / project opportunities

Ensure our digital foundations are optimised, secure, maintained and fit for the future

## Principle 2: Secure our information assets: prioritising safety of our information by investing to stay ahead of cyber security threats

### THE CHALLENGES:

- Our current traditional network model no longer represents best practice: it needs to be redesigned for a dispersed, hybrid organisation
- Designing and implementing a new zero-trust network model is needed to address risks inherent in traditional network security approaches
- Continuing to connect to dispersed resources via the PKC central network, means employees are more likely to experience access, and potentially business continuity, issues
- The likelihood and potential impact of cyber-threats are ever increasing and evolving, demanding automated defences to combat automated threats

### WE WILL:

- Fundamentally redesign our infrastructure around a zero-trust network model: deliver enhanced security, flexibility and resilience for verified, personalised access to Council resources
- Improve business continuity and remote working performance via secure direct connections, from any location to cloud and PKC hosted resources / systems
- Use Microsoft assets to implement enhanced security, compliance and productivity features / functionality
- Utilise automation and extend the scope of 24/7 security monitoring to provide increased protection across a wider range of ICT and digital assets

Secure our information assets: prioritising safety of our information by investing to stay ahead of cyber security threats

## Principle 3: Manage our data assets, and use them to derive business intelligence and insights for better outcomes for people and communities

### THE CHALLENGES:

- Our data assets, their sources, and points of consumption continue to grow more diverse and distributed
- Lack of clarity / understanding around data ownership is compromising data quality, integrity and compliance with records management policies
- Our traditional data architecture does not meet organisational needs for better business intelligence and effective data sharing
- Poor data quality is undermining and adding complexity to digital initiatives, contributing to non-optimal decision making
- Information about service users is held across a number of unintegrated systems, compromising scope for a single, shared view of customers
- The range of business intelligence tools in use has reduced opportunities for embedding organisational standards and shared expertise
- Levels of data literacy (skills, insight and expertise for handling, managing and using data effectively) are inconsistent

### WE WILL:

- Continue to develop, embed and promote a whole-Council Data Governance framework
- Continue to implement and improve the capabilities of standardised data management and analytics tools across the organisation
- Explore opportunities for developing our employee and customer information platforms (TotalMobile and Granicus / Firmstep)
- Investigate opportunities for developing cross-Council Customer Services and Internet of Things (IoT) platforms
- Develop a blueprint for customer portal design, including clarifying how people who use Council services will interact with us digitally
- Use information stored across the Council to improve the customer experience
- Deliver a rolling programme for improving data literacy

Manage our data assets, and use them to derive business intelligence and insights for better outcomes for people and communities

## Principle 4: Build and embed “One Council” standards and approaches for the Council’s application and business systems landscape

### THE CHALLENGES:

- Applications are owned, funded by, and shaped around individual business areas’ ways of working: as a result
  - opportunities for efficiency and optimisation are reduced
  - whole lifecycle costs for individual systems are difficult to quantify
  - information safety, infrastructure, data and integration are not always considered when business system owners make decisions about upgrades, replacements or moves to the cloud
  - there can be reluctance to move from Service-specific solutions to shared corporate platforms
- The Council’s complex multi-layered planning environment makes it difficult to identify overall ICT and digital asset priorities and allocate finite business system resources for maximum positive impact
- Retention of out of support and legacy applications, and shadow ICT (acquisition of assets without recourse to IT), both increase organisational risk and unpredictable resource-intensive demand for IT support

### WE WILL:

- Review and optimise the Council’s application landscape for improved governance, security, sharing, lifecycle management and efficiency
- Review / strengthen processes for decision-making around new business system acquisition
- Develop and embed a “cloud right” guide to standardise how we assess and manage opportunities for moving systems to the cloud at points of change

## Principle 5: Evolve fit for the future digital classrooms to help our children and young people achieve their full potential

### THE CHALLENGES:

- ICT / digital is a critical learning and teaching utility
- Learning from anywhere / remote readiness demands new ways of securing and managing devices and pupil users
- Classroom and school staff devices, audio visual assets and schools' infrastructure need to be supported by comprehensive fully funded replacement programmes
- Mechanisms will require to be identified for delivering the Scottish Government's "Access to a Device for Every Child" commitment
- Primary School Wi-Fi provision is unlikely to meet demand, and will require resource and effort to ensure appropriate access, when one to one devices are rolled out
- Replacement strategies and funding are required for Scottish Government Digital Inclusion pupil loan devices
- Education decisions are required around standard approaches for achieving a fit for the future digital learning environment: this includes for continuing one to one provision and potential joint strategies with Tayside partners

### WE WILL:

- Continue to evolve schools' ICT network, infrastructure and computer replacement programmes and our approaches for delivering them, to meet the needs of a modern learning and teaching environment
- Investigate options for moving Education users (school staff and children and young people) to a dedicated Microsoft tenancy
- Evolve how school users; devices and applications are managed for improved flexibility, mobility, security and access to centrally held resources
- Develop approaches and solutions to support national and local initiatives for pupil one to one device provision
- Evolve school broadband and Wi-Fi connectivity to meet growing demand
- Embed and deliver an equitable Audio Visual replacement programme

Evolve fit for the future digital classrooms to help our children and young people achieve their full potential

## Principle 6: Contribute to the Council's net zero commitments

### THE CHALLENGES:

- Since 2010, the number of internet users worldwide has doubled, and global internet traffic has grown 12-fold: the UN calculates ICT and digital technologies are responsible for 2-3% of all harmful emissions
- Depletion of natural resources as a result of technology build processes is increasing<sup>1</sup>: programmed obsolescence and low levels of recycling continue to generate unwanted digital and electronic device waste<sup>2</sup>
- Digital technologies such as sensors, Internet of Things (IoT), machine learning, geo-spatial mapping and data analytics, have the potential to provide innovative solutions for reducing global emissions of up to 20% by 2050<sup>3</sup>
- Energy efficiency options will require to be considered, when planning investment to replace current datacentre environmental systems

### WE WILL:

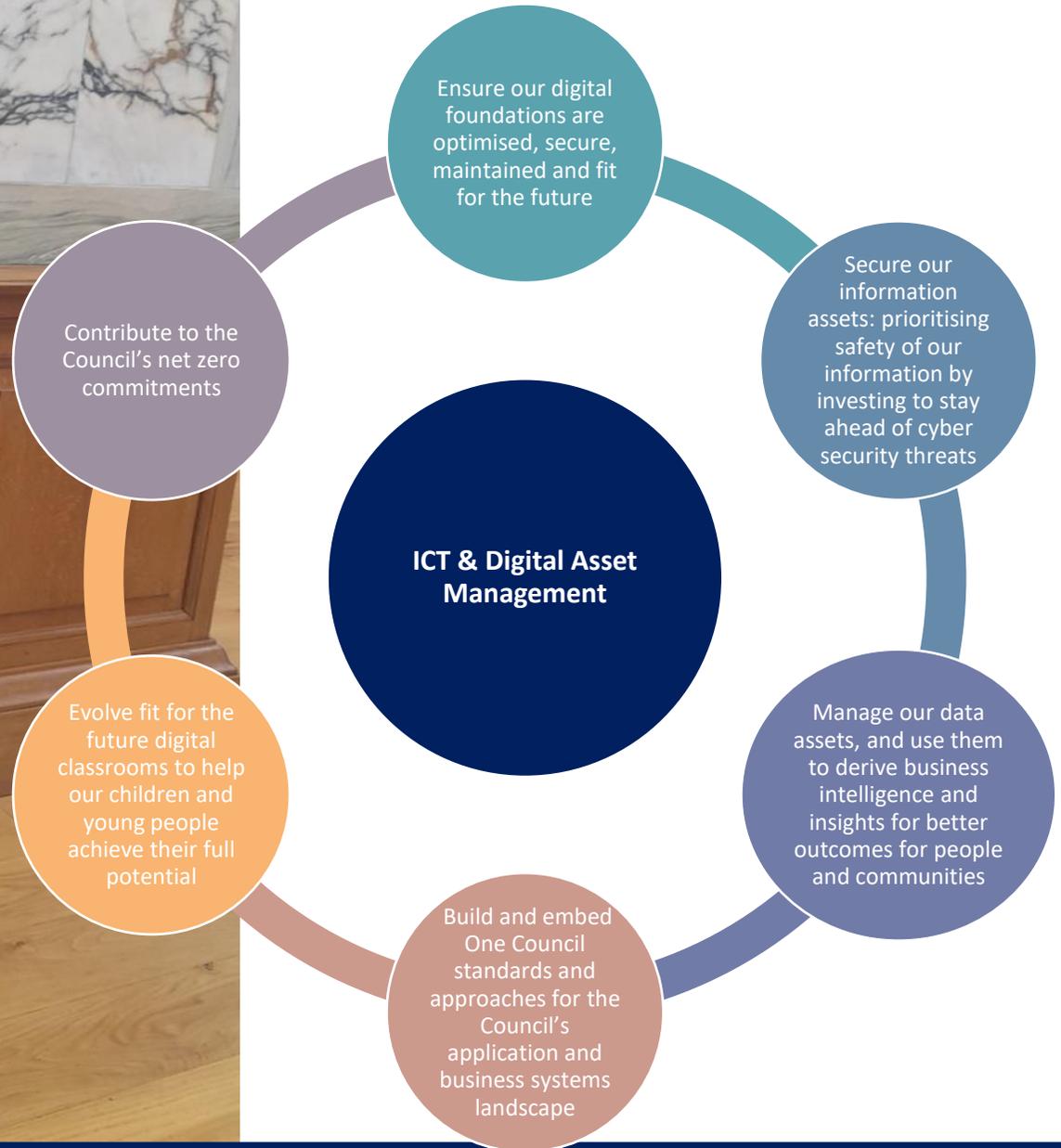
- Look for innovative opportunities for minimising electronic waste and making the Council's infrastructure sustainable and efficient
- Continue to explore opportunities for reducing our datacentre footprint, by moving services and applications to off-site / hosted datacentres, at points of change
- Minimise electronic waste / lower power consumption via the use of energy saving technologies
- Continue to build our remote support capacity to minimise fuel-consuming onsite visits

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<sup>1</sup> As per the Office of national Statistics analysis of the 2021 UK Census: "for the period April 2020 to March 2021 90% of private households in the UK had a home computer and 93% of households had access to a mobile telephone"

<sup>2</sup> United Nations Environment Programme

<sup>3</sup> World Economic Forum: [Digital Industries - Climate Scenarios \(weforum.org\)](https://www.weforum.org/publications/digital-industries-climate-scenarios) and [Digital and Climate \(weforum.org\)](https://www.weforum.org/publications/digital-and-climate)



# ICT & Digital Asset Management Plan

## Asset Overview

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Assets in a digital context are no longer just metal boxes: our concept of ICT and digital assets has to encompass a wider range of things that hold value for the Council.

The IT Service is responsible three distinct areas of activity within four capital asset management programmes:

- 1a. ICT Infrastructure, Replacement and Upgrade: The Council's ICT infrastructure comprises a complex web of integrated assets which requires to be maintained up to date, in support, and upgraded in alignment, to ensure users are able to safely access the information they need, when they need it.
- 1b. Schools' Audio Visual (AV) Equipment Replacement Programme:  
Although a distinct capital funding stream, synergies / similarities mean schools' AV asset management planning and related activities continue to be delivered in tandem with the ICT Infrastructure, Replacement and Upgrade Programme
2. Corporate Data & Analytics programme: better managing, and getting best value from, the Council's data assets
3. Supporting Digital Programme: helping the Council fully realise its digital ambitions, including developing shared digital platforms and growing digital skills, knowledge and expertise.

| IT Capital Programme                                   | Related assets                                                                                                                                                                                                                                                                                                                                                                                                                                                | Asset Category Includes                                                                                                                                                                                             |
|--------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ICT Infrastructure and Schools Audio Visual Programmes | Corporate and schools' network connections, connectivity, equipment and systems (broadband, Wi-Fi, network routers / switches, wireless access points and controllers, and remote access solutions)                                                                                                                                                                                                                                                           | 4148 network devices / appliances                                                                                                                                                                                   |
|                                                        | Datacentres / computer rooms in main offices / Sec Schools.<br>Small computer rooms in other PKC buildings                                                                                                                                                                                                                                                                                                                                                    | 2 x major<br>12 x significant                                                                                                                                                                                       |
|                                                        | Storage Area Network (SAN) and back up (file storage, back up, and disaster recovery capability and functionality)                                                                                                                                                                                                                                                                                                                                            | 125 terabytes on-premise storage                                                                                                                                                                                    |
|                                                        | Servers (hardware and software)                                                                                                                                                                                                                                                                                                                                                                                                                               | 125 physical & 265 virtual                                                                                                                                                                                          |
|                                                        | Telephony (call centres and call management tools, fixed and mobile connections, softphones and devices)                                                                                                                                                                                                                                                                                                                                                      | 2140 data, voice and text mobile connections<br>231 data only mobile SIMs                                                                                                                                           |
|                                                        | Perimeter defences / security for keeping Council information safe, including firewalls; anti-virus, email protection and web filtering, and solutions for managing access, identity, endpoint and mobile devices                                                                                                                                                                                                                                             | Comprehensive portfolio of integrated software and hardware assets /components                                                                                                                                      |
|                                                        | Microsoft estate: MS365; cloud and security products                                                                                                                                                                                                                                                                                                                                                                                                          | MS 365 for 3145 corporate & partner organisations / 3,110 school-based staff                                                                                                                                        |
|                                                        | Computing devices (standard laptop set ups and terminals for staff office / home use; and classroom desktops; laptops and iPads / Digital Inclusion loan devices for learning from home)                                                                                                                                                                                                                                                                      | 14,588                                                                                                                                                                                                              |
|                                                        | Audio Visual Boards / Panels in schools & corporate offices                                                                                                                                                                                                                                                                                                                                                                                                   | 1,493                                                                                                                                                                                                               |
|                                                        | Video conferencing set ups in the Council Chambers, central offices and schools                                                                                                                                                                                                                                                                                                                                                                               | 35                                                                                                                                                                                                                  |
| Corporate licences                                     | Corporate Geographic Information System (GIS) tools & website content management solution                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                     |
| Data & Analytics                                       | Delivering the governance, tools, technologies and organisation-wide capabilities required for optimising value from the Council's data assets                                                                                                                                                                                                                                                                                                                | N/A                                                                                                                                                                                                                 |
| Supporting Digital Programmes                          | This overarching programme includes: <ul style="list-style-type: none"> <li>• delivering the Customer Services Strategy</li> <li>• our core corporate employee and customer platforms for online services and mobile working,</li> <li>• using Microsoft's PowerPlatform to develop virtual assistants (chatbots)</li> <li>• resourcing innovation</li> <li>• building capacity and capabilities: digital skills; know how, insight and expertise.</li> </ul> | Online live services:<br>95 external and 18 internal<br><br>Mobile Working live services:<br>17 processes; 356 mobile users and 71 back office users<br><br>Virtual Assistant live services:<br>1 published service |

This plan relies on ICT asset data available as at 8 September 2023.

## Key Factors Influencing Delivery of ICT and Digital Asset Management

The management of our ICT and Digital assets is influenced by a variety of factors, which can be summarised as follows:

| External                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Internal                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• the current pace of change means standing still is now equivalent to taking a step backwards</li><li>• automated cyber threats continue to increase in number, complexity and potential impact</li><li>• regulatory and statutory changes will continue to have an impact, particularly around security</li><li>• new and changing national digital programmes may change the way we work and the tools we use</li><li>• the cost of maintaining and replacing our ICT and digital assets has increased significantly over the past 3 years: this is likely to continue as demand increases; production and transport costs rise and new technologies emerge</li><li>• more vendors are introducing cloud subscription models: this increases costs, while limiting local control</li><li>• supply chain vulnerabilities continue to have an impact on availability, costs and standards</li><li>• new knowledge, skillsets and expertise will be required to optimise our investment in emerging technologies, however recruitment to fill specialist roles is increasingly challenging</li><li>• new, innovative technologies and capabilities are coming to the market with increasing rapidity</li></ul> | <ul style="list-style-type: none"><li>• embedding existing one to one pupil provision and delivering any wider one to one roll out will require additional staff and resources</li><li>• balancing “run the business” and “change the business” workloads is likely to generate challenges not anticipated within this plan</li><li>• commitment to reduce carbon and improve energy efficiency will directly influence planned developments and improvements</li><li>• end of life and retirement planning for business systems will continue to generate exceptional work</li><li>• the volume of change required to move away from embedded business systems needs to be considered as part of ICT and digital contract renewals and roll-overs</li></ul> |

## Baseline Position

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For capital accounting purposes the (unaudited) net book value of the ICT assets as 31 March 2023 is £12,104,470.

### ICT Infrastructure and Schools Audio Visual Assets

Ongoing cost increases affecting all areas of ICT and digital spend continue to be a challenge across the public sector. This pressure will increase incrementally as organisations become more digital, work in more mobile ways and consume more services online. More than ever, there is a fundamental requirement to ensure that investment is effective, strategically guided and based on “One Council” principles.

Key physical asset data in relation to asset type, lifecycle information and value for money is continually being captured and updated within the ICT Asset Management System (Service Desk).

Business intelligence derived from this data informs decision making and provides a foundation for PKC’s future planning around ICT and digital asset investment and management.

### Data & Analytics Assets

Across the Council, data assets are captured and interrogated to inform planning and service delivery. Currently:

- use of data assets tends to be backward-looking to report past performance, rather than forecast or inform the future
- Council data is regularly managed with only immediate Service requirements in mind and does not conform to any consistent cross organisation standard. This limits potential to derive business intelligence or support end to end service digital service delivery
- data quality is uneven: even where it is good, there is no way to prove this
- skills, literacy and tools to exploit data assets are limited.

Building up from this baseline position, the Data & Analytics Programme is putting in place the foundations for better managing data as a corporate asset. This includes embedding a whole-Council Governance Framework, approaches, tools and capabilities for managing our data assets in a more effective, efficient, and cohesive way. As these foundations continue to mature, we will derive more and better knowledge, insight, and benefit from our data assets, to maximize their value to decision makers and citizens.

### Supporting Digital Programmes Assets

PKC has two established platforms for creating digital assets:

- Online Services (MyPKC)
- Mobile Working

These assets are largely intangible but deliver value for the organisation and service users by enabling 24/7 engagement for customers and providing employees with access to required information that can be updated in real time from anywhere.

This reduces journeys to and between offices (and by extension our carbon footprint) and enables customers to engage with the Council without travelling to a central office.

## Condition

The IT Service provides comprehensive asset installation, maintenance, upgrade, repair and support services, accessible to users via a range of channels, to ensure ICT and digital assets remain in use and usable, throughout established lifecycles.

While ICT assets have an identified end of life target date for replacement planning, some efficiencies are achieved via their retention and continuing use beyond anticipated removal dates: assets may be retained in use for longer than established lifecycles, where this is practicable without compromising security and performance. Future availability of, and anticipated benefits from, new technologies can also influence decision-making around retention

### ICT Infrastructure and Schools Audio Visual Assets

All physical assets must be in a safe condition.

Physical ICT assets are considered to be life expired when they are beyond economic repair; delivering a degraded user experience; cannot be security patched, upgraded or connected within the core network or when their retention no longer represents value for money (e.g. when their continuing use demands exceptional support or infrastructure adaptations).

Currently 7,260 (25%) assets have exceeded their planned lifespan, the majority of these are desktop and laptop computers. 22,204 (75%) of ICT assets are within their agreed lifecycle.

### Data & Analytics Assets

At present, there are no established standards that specifically define condition requirements for Data & Analytical assets. Within the overarching Data & Analytics governance framework, there is a strategic aspiration for developing a comprehensive Data Catalogue for all business critical data assets, that establishes accountability and supports reporting on condition / quality. This represents a significant body of work that will only be achieved over time: categorising data assets within a central data repository is an initial priority.

### Supporting Digital Programmes Assets

Condition is binary for online, mobile working and virtual assistant / chatbot assets: these are either live (published) or unavailable (unpublished).

## Suitability

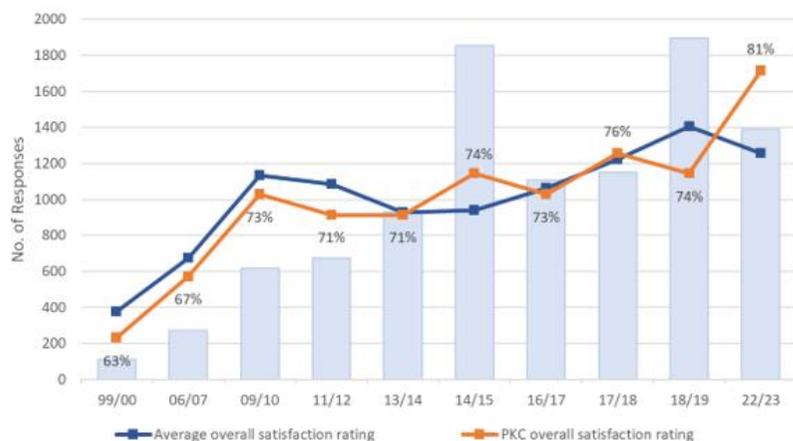
ICT and digital assets suitability is assessed and measured using a range of different approaches:

### ICT Infrastructure and Schools Audio Visual Assets

The corporate Digital Board and Education Establishments ICT Change Board, as governance groups for ICT / digital and the learning and teaching perspectives respectively, each have a role in endorsing IT device standards as suitable for the users they represent.

Due to the complexity and inter-connectedness of the Council’s ICT and digital environment, gauging the ongoing suitability of assets – the extent to which these continue to meet the needs of service users - can be challenging. The standard industry approach is to look at how employees rate their overall experience of using ICT.

ICT benchmarks suitability via the Society of Information Technology Management (SOCITM) which is widely used in the public sector. In late 2022, our SOCITM customer survey reported an overall PKC satisfaction rate of 81%, which placed us above the national average of 76%, and joint top of our benchmarking cohort.



### Data & Analytics Assets

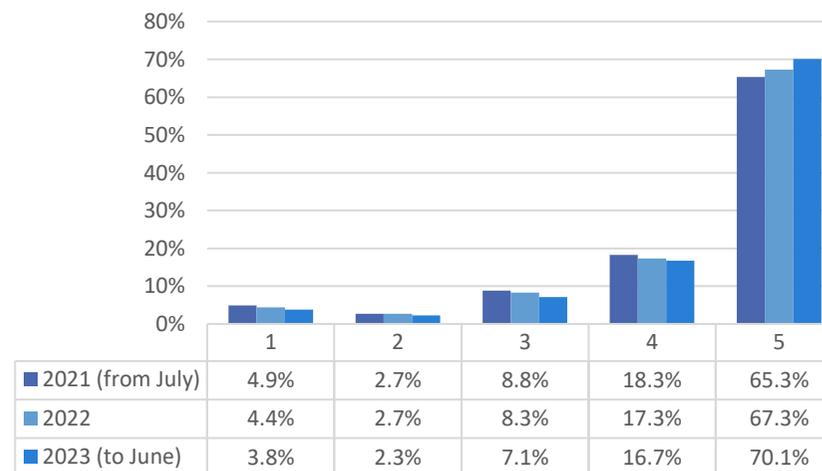
Insight into suitability of data assets will emerge over time, as our organisational understanding of data quality, consistency and accuracy matures and we are using the business intelligence derived from information assets effectively.

### Supporting Digital Programmes Assets

New digital assets are designed around requestors’ detailed specification of requirements, to ensure, as far as practicable, resulting services are fit for purpose.

Since July 2021, internal and external users have been asked to rate their experience of using online Council services:

### Customer Experience Ratings



\*Ratings based on a scale of 1 to 5 (where 1 is poor and 5 is excellent)

Similarly, Mobile Working developments are the result of extensive collaborative modelling between Programme and business specialists, to ensure the resulting processes / capabilities meet the specific needs of the requesting Service: suitability is built in by design. A nationally recognised benefits realisation approach is used to indicate anticipated impact of proposed new processes.

## Utilisation

Utilisation is reviewed across ICT and digital in a number of different ways, including:

### ICT Infrastructure and Schools Audio Visual Assets

- ongoing requirement checks are made before new devices are allocated within standard corporate and school computer replacement programmes.
- a disconnect policy, which is in place to mitigate security risk from corporate computers that have not been connected to a Council network for more than 90 days. This security process identifies underused devices and triggers conversations around re-use, return and reallocation
- mobile phone usage data is periodically reviewed and reported to Services, supports informed decisions around need
- infrastructure / system dashboards are used to monitor system and server health.

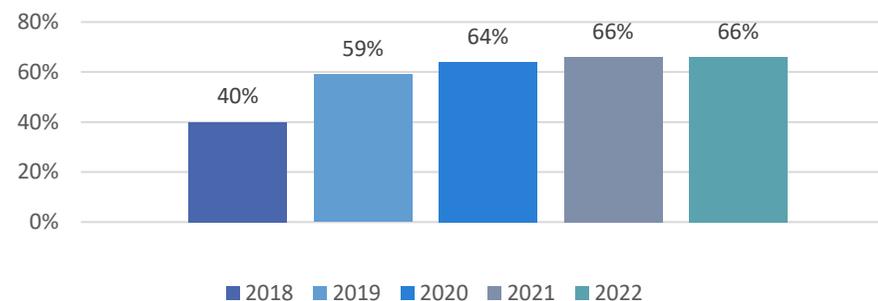
### Data & Analytics Assets

Utilisation of standard data tools is currently low: adoption, and capabilities for using these tools, are limited, to date. Planned work within the Data & Analytics Programme will promote the standard toolkit more widely and work through a cross-Service Steering Group to develop skills within Services for managing and using data.

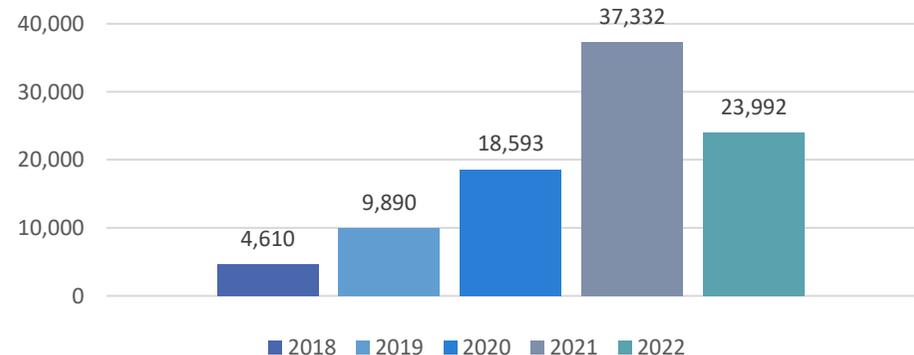
## Supporting Digital Programmes Assets

**Online services (MyPKC) uptake monitoring:**

### MyPKC Self service take up (external cases)



### MyPKC Self service take up (internal cases)



\*Substantial increase in 2022 internal instances due to COVID working from home Display Screen Assessment checks

**Mobile working services** is the default daily work tool for enabled users. There are currently approximately 427 employees using the Council's Mobile Working platform: this number will grow as more service assets are introduced.

## Value for money

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Value for money of ICT and digital assets is defined by the most advantageous combination of combination of cost, quality / fitness for meeting identified requirements; security; compatibility / ability to integrate with existing resources; futureproofing and sustainability.

Importantly, the cost of change needs to be considered when assessing value for money of any new investment: this includes disruption to customers; impact of any periods of service non-availability; demand for external expertise and knowledge; implementation and decommissioning activities; design and introduction of new business processes; and upskilling users.

This is tested, via:

- Scottish Government frameworks
- Crown Commercial Services and NHS framework
- Public Contract Scotland tender processes
- Non-standard procurement, endorsed via a corporate Contract Panel Exemption, generally where due diligence has demonstrated that the benefits delivered via an expiring contract cannot be realised via an alternative supplier / contract arrangement or where it has not been possible to move, as planned, to a new technology in time to align with contract end dates.

This hierarchy of buying routes maximises use of national “buying power”; simplifies and streamlines procurement overheads and drives consistency and compliance.

## Climate Change

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Across all four IT asset management programmes there is a shared strategic ambition for reducing the environmental impact of the technology we use.

A key aim of these programmes is changing the way we work to be more efficient: this is having a positive environmental impact, including:

- moving services online to make them more accessible to people and communities, without the need to travel to a central office
- introducing more device and user remote management tools, and video conferencing equipment in main offices / schools, to support a more dispersed hybrid workforce
- investigating options for an enterprise IoT environment
- combining data and analytics capabilities with data gathered via new technologies to inform Climate Action Plan priorities
- continuing to minimise the number of physical servers in use
- standardising desk setup, with guidance provided for exceptions
- replacing older equipment, where appropriate, with newer, more energy-efficient models.

Sourcing any ICT hardware assets increasingly demands evaluating vendors’ commitment to energy efficiency. Key Scottish and UK government frameworks build in sustainability as a key criterion for identifying preferred suppliers.

The Council partners with a local SEPA Approved Authorised Treatment Facility for the disposal of obsolete ICT hardware. Following the secure destruction of hard drives on information safety grounds, remaining components are recycled or refurbished as far as possible.

It is important that IT capital asset programmes look for ways to tackle the climate challenges throughout asset lifecycles: this means being careful about *how* and *when* we use assets, as well as *what* we use.

## Compliance

Our ICT and digital infrastructure /environment is scrutinised via the Public Sector network (PSN) certification process. Successful achievement of annual certification demonstrates our security arrangements, policies and controls are sufficiently rigorous, to permit continuing delivery of critical services via the PSN network and engagement with other public bodies connected to it.

The Council is also subject to:

- Substantive body of Data Protection; Information Security; Freedom of Information; and Computer Misuse legislation
- Waste Electrical and Electronic Equipment (WEEE) Regulations

## Maintenance

Maintenance of ICT assets is split into two workstreams:

|                            |                                                                                                                                                                                      |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reactive Repairs</b>    | Responses to unplanned incidents including: critical security updates; hardware / software failure; loss of connectivity; and system non-availability                                |
| <b>Planned Maintenance</b> | Planned changes including health checks; information security patching /updates; data quality checks; upgrades, replacements and improvements; and license management / optimisation |

## Cost of the ICT and Digital Asset

The Council operates a centralised model for delivery of most ICT infrastructure services, with the IT Service responsible for strategy, replacement programmes, management and budget **The cost information provided in this Plan is limited to IT budgets / investment in ICT and digital assets.**

A de-centralised model is in place for the purchase of:

- approximately 50% of school computers, which are funded directly by schools. A further 25% of computers currently associated with schools were funded by the Scottish Government via a one-off Digital Inclusion Grant
- curriculum software and iPad apps
- device needs beyond standard desktop set ups
- most Service-owned business systems, applications and software

**The cost of these Service and school-funded assets are not reflected in this Strategy / Plan.** However, for completeness, computers funded by schools and Services are included in device totals provided.

The resulting spread of Service and school costs can make it problematical to identify, or positively influence, related investment for whole organisation benefit. This potentially contributes to a lack of a shared vision for digital across the organisation and presents challenges when considering “One Council” ways for embedding organisational asset standards; leveraging vendors / economies of scale; and mapping our whole asset landscape.

Principle 4 in this Plan (“Build and embed “One Council” standards and approaches for the Council’s application and business systems landscape”) is specifically designed to address some of these challenges.

## The Investment Blueprint

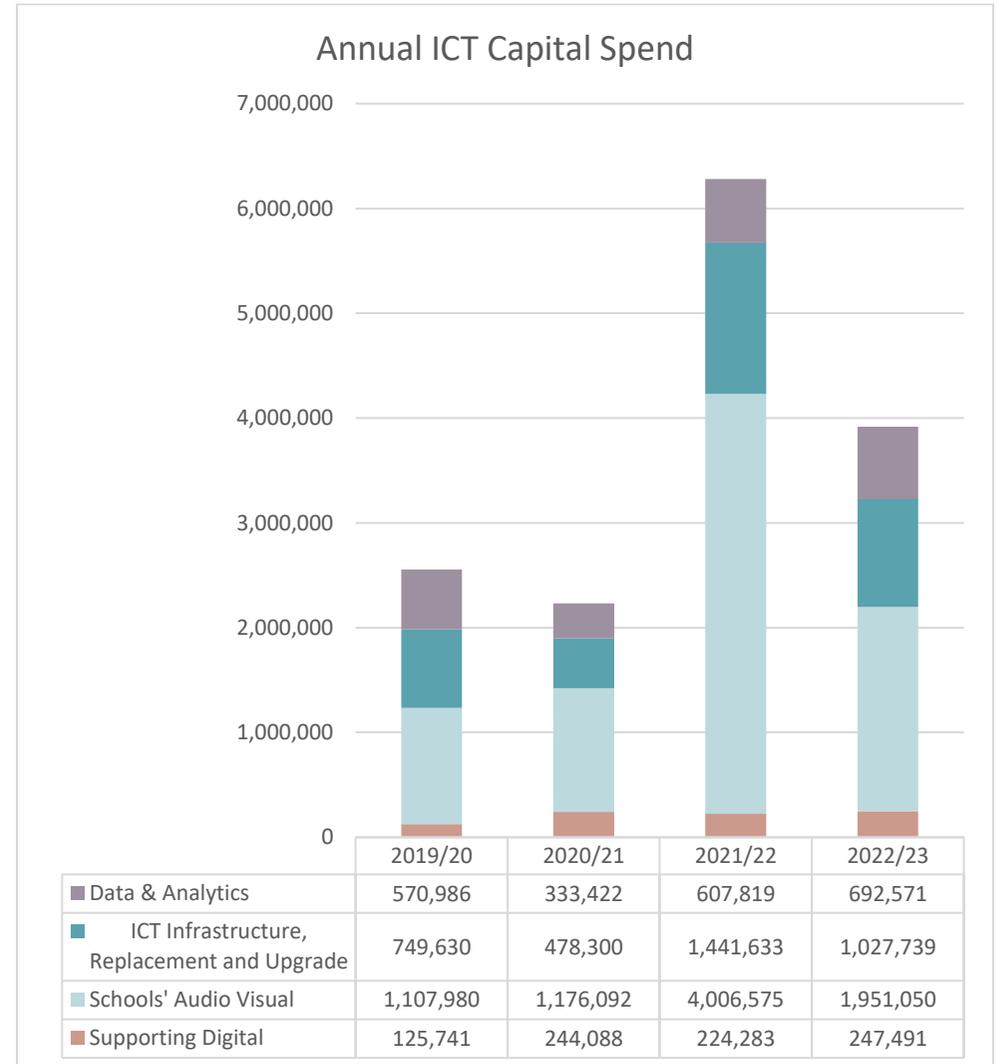
In 2021 Perth & Kinross Council approved the Investment Blueprint, which sets out the rationale and key drivers for change. It provides five overarching principles to inform decision-making and direct the investment of public money where it is most needed. To align with these principles, investment decisions must: -

- mitigate against the impact of climate change
- promote inclusive economic growth and a vibrant community
- promote equality
- support the delivery of sustainable public services through effective management of our assets
- promote and enhance digital inclusion

The Blueprint's function is to identify future investment priorities and to establish a more transparent and flexible approach to investment decision-making, ensuring that capital investment decisions support corporate objectives and priority outcomes.

## Capital

IT capital expenditure is illustrated in the chart below. Total capital expenditure for 2022/2023 was **£3,918,851**.



## 6-Year Funded Capital Programmes

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IT capital asset programmes are well-established for delivering sound digital foundations, innovative change for the Council’s ICT infrastructure and for developing “One Council” platforms and approaches for managing information. Scrutiny, oversight and escalation, in the event of competing priorities, rests with the cross-Service Digital Board.

IT follows some basic approaches to build in predictability, forecasting and financial planning around our ICT and digital assets - embedded replacement strategies; active contract management for insight into product roadmaps and emerging technologies; and informed asset analysis. Previous cost trends and points of change, such as contract renewals and end of support notices, are used to help estimate future asset replacement requirements and timelines.

| <b>Programme Name</b>           | <b>Purpose</b>                                                                                                                 |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| ICT Infrastructure              | Replacement, re-design, improvement and upgrade of ICT infrastructure                                                          |
| Schools Audio Visual Programmes | Replacement and upgrade of Schools Audio Visual equipment                                                                      |
| Data & Analytics                | Delivering trusted data, standard tools and skills for better business intelligence and informed decision making               |
| Supporting Digital Programmes   | Developing shared digital platforms, investigating innovative technologies and growing digital skills, knowledge and expertise |

## 30-Year ICT / Digital Investment Plan

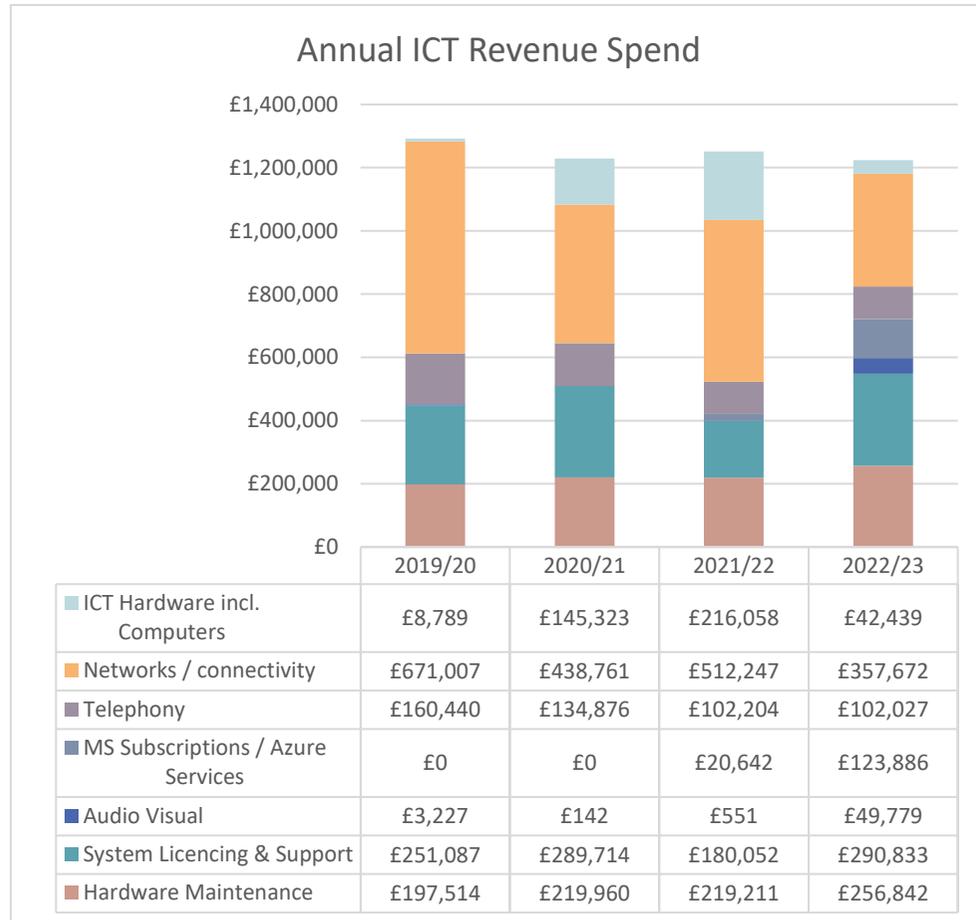
To enable investment planning beyond the 6-year funded programme, a 30-year ICT and Digital investment plan has been established, based on the lifecycle of existing ICT and digital assets. This unfunded plan serves as a tool for asset lifecycle planning, with the primary objective being to provide an asset-wide perspective that anticipates investment needs, net of inflationary increases.

The plan projects a potential **£207m** investment required over 30 years (2024-2053) to maintain, improve and develop our current ICT and digital assets at current asset provision. This 30 year plan is based on best lifecycle information available about the equipment we use now or are planning to implement within the next 6 years:

| Year                   | IT Infrastructure Replacement Programme |                        |                    |                      |                             |                   |                  |                  | Schools AV             | Data & Analytics Programme |                            | Supporting Digital Programme |                   |                            | Grand Total        |
|------------------------|-----------------------------------------|------------------------|--------------------|----------------------|-----------------------------|-------------------|------------------|------------------|------------------------|----------------------------|----------------------------|------------------------------|-------------------|----------------------------|--------------------|
|                        | Computers                               | GIS & Website Licenses | Microsoft Licenses | Networks & Telephony | Security, Servers & Storage | Staff Resources   | VC & Chambers    | Contin-gency     | Replace-ment Programme | Staff Resources            | System Licenses & Services | Customer Services            | Staff Resources   | System Licenses & Services |                    |
| 2024                   | 101,712                                 | 0                      | 299,069            | 1,439,475            | 184,322                     | 391,085           | 4,387            | 0                | 100,000                | 466,249                    | 166,601                    | 6,576                        | 556,057           | 103,396                    | 3,818,928          |
| 2025                   | 710,665                                 | 24,806                 | 3,928,504          | 626,367              | 630,397                     | 491,217           | 11,698           | 321,183          | 173,283                | 578,625                    | 227,675                    | 132,560                      | 623,602           | 156,642                    | 8,637,222          |
| 2026                   | 745,155                                 | 106,292                | 10,000             | 864,640              | 648,000                     | 505,953           | 50,689           | 146,536          | 35,244                 | 580,676                    | 365,243                    | 104,137                      | 693,060           | 130,151                    | 4,985,776          |
| 2027                   | 803,224                                 | 27,349                 | 191,108            | 881,622              | 315,000                     | 521,132           | 190,194          | 146,481          | 35,244                 | 542,222                    | 177,930                    | 80,761                       | 713,852           | 133,835                    | 4,759,953          |
| 2028                   | 766,255                                 | 28,716                 | 4,908,319          | 788,685              | 319,636                     | 536,766           | 39,298           | 369,384          | 35,244                 | 557,704                    | 149,701                    | 25,000                       | 735,267           | 424,997                    | 9,684,973          |
| 2029                   | 508,738                                 | 117,045                | 10,000             | 2,641,712            | 1,975,690                   | 552,869           | 11,735           | 290,889          | 299,574                | 572,843                    | 143,226                    | 25,000                       | 757,325           | 131,246                    | 8,037,893          |
| 2030                   | 722,925                                 | 29,578                 | 191,108            | 803,990              | 417,500                     | 569,455           | 11,698           | 137,313          | 470,210                | 590,028                    | 143,226                    | 25,000                       | 780,045           | 114,349                    | 5,006,424          |
| 2031                   | 757,415                                 | 29,578                 | 4,908,130          | 688,709              | 343,136                     | 569,455           | 85,381           |                  | 871,489                | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 9,884,325          |
| 2032                   | 810,750                                 | 117,046                | 10,000             | 825,124              | 515,220                     | 569,455           | 19,098           |                  | 1,110,586              | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 5,608,311          |
| 2033                   | 778,515                                 | 29,578                 | 191,108            | 806,748              | 80,000                      | 569,455           | 62,426           |                  | 1,173,847              | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 5,322,708          |
| 2034                   | 469,535                                 | 29,578                 | 4,908,130          | 2,375,627            | 1,680,106                   | 569,455           | 11,698           |                  | 244,795                | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 11,919,956         |
| 2035                   | 722,925                                 | 117,046                | 10,000             | 710,641              | 831,220                     | 569,455           | 11,698           |                  | 218,513                | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 4,822,530          |
| 2036                   | 757,415                                 | 29,578                 | 191,108            | 858,384              | 73,000                      | 569,455           | 50,689           |                  | 321,576                | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 4,482,236          |
| 2037                   | 810,750                                 | 29,578                 | 4,908,130          | 1,069,142            | 381,136                     | 569,455           | 200,658          |                  | 35,244                 | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 9,635,125          |
| 2038                   | 778,515                                 | 117,046                | 10,000             | 588,610              | 542,720                     | 569,455           | 39,298           |                  | 35,244                 | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 4,311,920          |
| 2039                   | 469,535                                 | 29,578                 | 191,108            | 2,464,778            | 1,732,470                   | 569,455           | 11,698           |                  | 299,574                | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 7,399,228          |
| 2040                   | 722,925                                 | 29,578                 | 4,908,130          | 585,661              | 512,636                     | 569,455           | 11,698           |                  | 470,210                | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 9,441,325          |
| 2041                   | 757,415                                 | 117,046                | 10,000             | 615,504              | 430,220                     | 569,455           | 85,381           |                  | 871,489                | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 5,087,542          |
| 2042                   | 810,750                                 | 29,578                 | 191,108            | 996,957              | 74,000                      | 569,455           | 19,098           |                  | 1,110,586              | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 5,432,563          |
| 2043                   | 778,515                                 | 29,578                 | 4,908,130          | 957,686              | 338,636                     | 569,455           | 62,426           |                  | 1,173,847              | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 10,449,305         |
| 2044                   | 469,535                                 | 117,046                | 10,000             | 2,700,201            | 1,963,190                   | 569,455           | 11,698           |                  | 244,795                | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 7,716,952          |
| 2045                   | 722,925                                 | 29,578                 | 191,108            | 615,178              | 344,500                     | 569,455           | 11,698           |                  | 218,513                | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 4,333,986          |
| 2046                   | 757,415                                 | 29,578                 | 4,908,130          | 527,446              | 290,636                     | 569,455           | 50,689           |                  | 321,576                | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 9,085,957          |
| 2047                   | 810,750                                 | 117,046                | 10,000             | 918,204              | 640,220                     | 569,455           | 200,658          |                  | 35,244                 | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 4,932,609          |
| 2048                   | 778,515                                 | 29,578                 | 191,108            | 518,604              | 115,000                     | 569,455           | 39,298           |                  | 35,244                 | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 3,907,833          |
| 2049                   | 469,535                                 | 29,578                 | 4,908,130          | 2,636,611            | 1,747,106                   | 569,455           | 11,698           |                  | 299,574                | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 12,302,719         |
| 2050                   | 722,925                                 | 117,046                | 10,000             | 736,599              | 730,220                     | 569,455           | 85,381           |                  | 470,210                | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 5,072,868          |
| 2051                   | 757,415                                 | 29,578                 | 191,108            | 940,078              | 245,500                     | 569,455           | 19,098           |                  | 871,489                | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 5,254,752          |
| 2052                   | 810,750                                 | 29,578                 | 4,908,130          | 901,494              | 243,136                     | 569,455           | 62,426           |                  | 1,110,586              | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 10,266,587         |
| 2053                   | 778,515                                 | 117,046                | 10,000             | 626,748              | 515,220                     | 569,455           | 11,698           |                  | 1,173,847              | 506,692                    | 143,226                    | 25,000                       | 841,765           | 114,349                    | 5,433,561          |
| <b>Grand Total</b>     | <b>20,861,916</b>                       | <b>1,713,824</b>       | <b>50,220,903</b>  | <b>32,711,225</b>    | <b>18,859,773</b>           | <b>16,665,942</b> | <b>1,495,285</b> | <b>1,411,786</b> | <b>13,866,877</b>      | <b>15,542,263</b>          | <b>4,667,800</b>           | <b>974,034</b>               | <b>24,219,802</b> | <b>3,824,642</b>           | <b>207,036,071</b> |
| <b>Programme Total</b> | <b>143,940,653</b>                      |                        |                    |                      |                             |                   |                  |                  | <b>13,866,877</b>      | <b>20,210,063</b>          |                            | <b>29,018,478</b>            |                   |                            | <b>207,036,071</b> |

## Revenue

Total ICT and digital asset expenditure for the previous 4 years is shown below. For 2022/2023, the total revenue expenditure in relation to ICT and digital assets was **£1,223,478**.

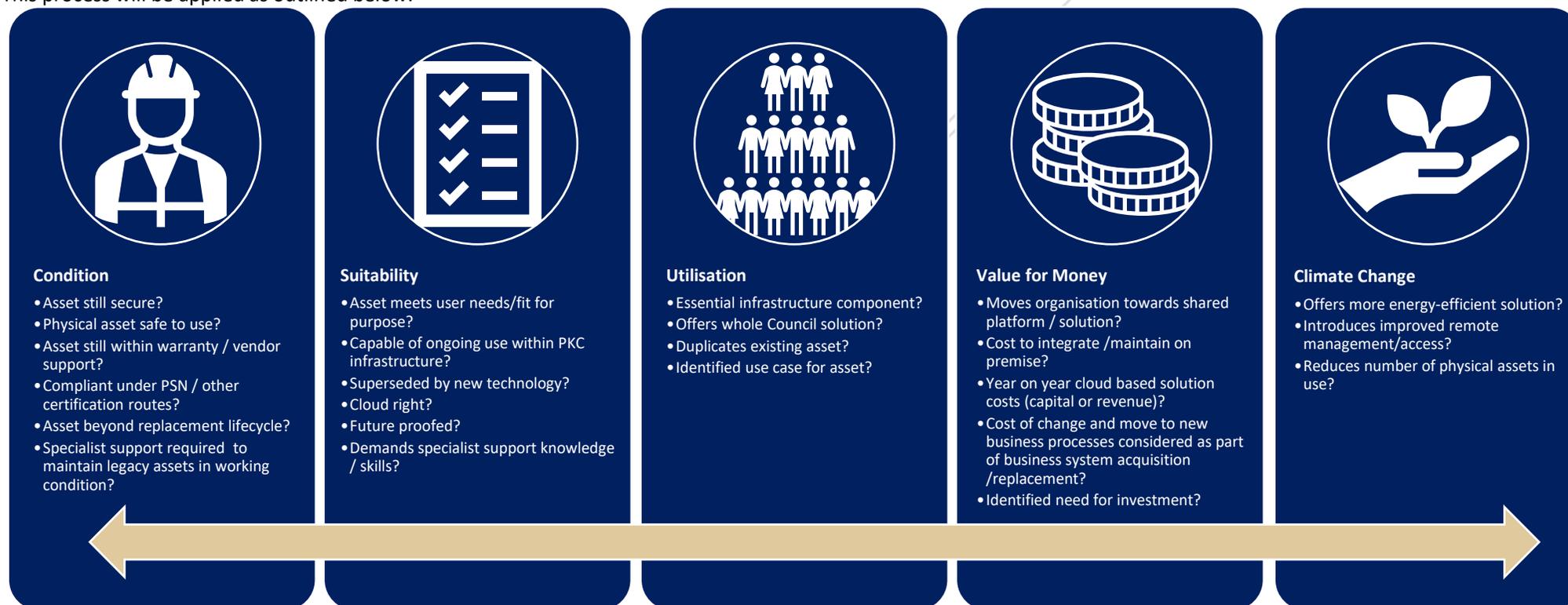


## How We Inform Investment – Asset Challenge

In line with our Corporate Asset Management Strategy, and related principles, we will ensure that investment is effectively targeted via the undertaking of an assessment and challenge of all ICT and digital assets:

- as a key part of annual benchmarking
- as a key part of the annual capital budget process
- as a key part of the annual revenue budget process

This process will be applied as outlined below:



## Using the Asset Challenge Model

ICT and digital asset investment proposals are considered in the context of the **Asset Challenge** to ensure they represent the most effective option for delivering best customers outcomes / meeting organisational need.

Ongoing monitoring and review of ICT and digital assets will be completed to ensure that they meet agreed standards:

| Asset Category                                         | Asset Classification                                                                   | Condition<br>(Lifecycle – years)<br> | Suitability<br> | Utilisation<br> | Value for Money<br>                                                           | Climate Change<br> |
|--------------------------------------------------------|----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|
| <b>ICT Infrastructure &amp; Schools' AV Programmes</b> | Computers                                                                              | 5                                                                                                                     | As per standards of provision endorsed by the appropriate governance group                         | Monitored to trigger appropriate action in the event target usage thresholds are not met           | Investment is shaped around clear specification of requirements and best value for meeting identified needs: resulting assets are acquired to meet defined needs | Climate impact evaluated as part of procurement process                                               |
|                                                        | Laptops                                                                                | 5                                                                                                                     |                                                                                                    |                                                                                                    |                                                                                                                                                                  |                                                                                                       |
|                                                        | Tablets                                                                                | 5                                                                                                                     |                                                                                                    |                                                                                                    |                                                                                                                                                                  |                                                                                                       |
|                                                        | iPads                                                                                  | 5                                                                                                                     | Governance groups also available to endorse decisions around ongoing asset suitability             |                                                                                                    |                                                                                                                                                                  |                                                                                                       |
|                                                        | Servers                                                                                | 5-7                                                                                                                   | New assets are capable of integration within our infrastructure                                    |                                                                                                    |                                                                                                                                                                  |                                                                                                       |
|                                                        | Network / communication devices: e.g. Switches, Controllers and Wireless Access Points | 5-10                                                                                                                  |                                                                                                    |                                                                                                    |                                                                                                                                                                  |                                                                                                       |
|                                                        | Interactive AV / display panels                                                        | 10                                                                                                                    |                                                                                                    |                                                                                                    |                                                                                                                                                                  |                                                                                                       |
|                                                        | Monitors                                                                               | Replace on fail                                                                                                       |                                                                                                    |                                                                                                    |                                                                                                                                                                  |                                                                                                       |
|                                                        | Docks                                                                                  |                                                                                                                       |                                                                                                    |                                                                                                    |                                                                                                                                                                  |                                                                                                       |
| Printers                                               |                                                                                        |                                                                                                                       |                                                                                                    |                                                                                                    |                                                                                                                                                                  |                                                                                                       |
| <b>Data &amp; Analytics Programme</b>                  | N/A                                                                                    | Data available, accessible and of sufficient                                                                          | New reports and dashboards developed based on detailed specification of needs                      | Requirements / spend evaluated on basis of whole-Council fit                                       | Re-use and recycle where appropriate to avoid increasing the volume of ICT assets in use                                                                         |                                                                                                       |
|                                                        |                                                                                        |                                                                                                                       |                                                                                                    | Assets acquired via a compliant route to market                                                    | Technology and approaches like virtualisation used smartly to reduce environmental impact                                                                        |                                                                                                       |
|                                                        |                                                                                        |                                                                                                                       |                                                                                                    |                                                                                                    | Online channels exploited to make more services accessible from within the                                                                                       |                                                                                                       |

|                          |     | quality to inform decision making                        |                                                                                                                                                                                                                    |  |  | communities we serve |
|--------------------------|-----|----------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|----------------------|
| <b>Digital Programme</b> | N/A | Continuing availability of assets that meet users' needs | <p>New digital assets created based on comprehensive statement of requirements: suitability is built in.</p> <p>Tested via customer and employee ratings (for online and mobile working products respectively)</p> |  |  |                      |

## How We Will Inform Investment – Adherence to Strategic Principles

The following pages are grouped into the six strategic principles set out within the ICT & Digital Asset Management Strategy. They provide context and specific background information which has been used to create an action plan:

1. Ensure our digital foundations are optimised, secure, maintained and fit for the future
2. Secure our information assets: prioritising safety of our information by investing to stay ahead of cyber security threats
3. Manage our data assets, and use them to derive business intelligence and insights for better outcomes for people and communities
4. Build and embed “One Council” standards and approaches for the Council’s application and business systems landscape
5. Evolve fit for the future digital classrooms to help our children and young people achieve their full potential
6. Contribute to the Council’s net-zero commitments

The document concludes with a Key Strategic Objectives Action Plan, which sets defines the key strategic objectives over the next 6 years.



*Principle 1: Ensure our digital foundations are optimised, secure, maintained and fit for the future*

**Continue to deliver and refine ICT network, infrastructure and computer replacement programmes / approaches to meet evolving needs:** IT will continue to review and deliver asset replacement programmes, shaped around appropriate refresh cycles for individual equipment categories and the availability of emerging technologies. This will ensure the Council's ICT infrastructure remains current, accessible and available, and employees have equitable access to the ICT / digital resources they need for their role.

**Evolve digital workplace and device standards in line with corporate ambitions:** the way we work is changing: we are more mobile, flexible and reliant on technology to connect us with customers, colleagues and resources. It is important the ICT assets provided to employees reflect our changing needs, while remaining secure, robust and affordable.

**Develop our vulnerability and patch management strategies to ensure these are efficient and reflective of best practice:** Malicious attackers can use vulnerabilities to gain unauthorised access to systems and data, leading to disruption to services and/or data breaches. Vulnerabilities evolve and are constantly being identified: processes for managing the risk they present need to keep in step, to ensure our data remains protected, assets remain effective, risks are managed and security compliance is maintained. This will also help us ensure we continue to meet the specific security standards required for accreditation to industry standard frameworks and agreements.

**Evolve our data storage, back up assets and disaster recovery capabilities to keep Council information safe and secure:** Securing valuable Council data is critical to maintaining operational stability. Data needs to be stored logically and securely; accessible to authorised users and restored quickly if inadvertently lost. Increasing reliance on cloud services means we have to look for modern tools and approaches for securely managing Council data assets, to minimise impact arising from cyber security breaches or system failures, as far as practicable within individual cloud hosting contracts.

**Horizon-scan / identify new technologies for helping us work more digitally, innovatively and efficiently:** New products, services and tools are coming to the

market at an increasing rate and are enablers for improvement, transformation and positive change. To realise best value from finite ICT/ digital investment, it is important that IT keeps abreast of emerging opportunities for developing, securing, enhancing and optimising our assets.

**Continue to nurture IT talent, skills and expertise via Development roles and programme / project opportunities:** We need to grow our IT capabilities and capacity in line with evolving technologies and our digital ambitions. IT will continue to promote fixed term Development posts to provide opportunities for staff to gain experience in different digital disciplines, with new technologies or at higher levels of responsibility. Infrastructure Programmes and Projects will also continue to be used to broaden experience, develop planning and analytical skills / awareness and build sustainable support capacity.

*Principle 2: Secure our information assets: prioritising safety of our information by investing to stay ahead of cyber threats*

**Fundamentally redesign our infrastructure around a zero-trust network model: deliver enhanced security, flexibility and resilience via a fit for the future ICT network that gives employees verified, personalised access to Council resources:**

The ICT / digital landscape is constantly changing. Malicious actors are taking advantage of traditional network structures to gain unauthorised access to sensitive data, as well as spread harmful software such as ransomware. As our data, resources, and users become increasingly dispersed, the challenge of securing our network becomes more complex. We need to meet more automated threats with more automated defences. The Council is reshaping its network model based on industry best practices, to build a secure fit for the future IT environment: this will be critical enabler for digital transformation and a fully mobile workforce.

**Improve business continuity and remote working performance by having secure direct connections, from any location, to cloud and PKC hosted resources / systems:**

Many employees use business applications and services hosted in the cloud. We are currently unable to fully benefit from the resilience these tools offer because all network traffic from corporate devices goes through the Council's physical network infrastructure. To fully realise resilience and performance benefits, we need to find new ways to connect users directly to the resources they need while maintaining security and access controls, availability, and visibility.

**Use Microsoft assets to implement enhanced security, compliance and productivity features / functionality:**

The Council invests in a comprehensive portfolio of Microsoft Agreements. The MS product set is continually evolving, including to combat cyber threats and provide more cloud-based options. We can exploit emerging opportunities to optimise investment in MS assets, by implementing new features and functions, including evolving "zero trust" products. These will help us neutralise risk from compromised user accounts, infected devices, and unwanted intrusion, by introducing more secure user identity / device verification and ensuring users only have access to the specific applications, resources, and destinations they need to do their job.

**Utilise automation and extend the scope of 24/7 security monitoring to provide increased protection across a wider range of ICT and digital assets:** Cyber-attacks are becoming more frequent and more sophisticated. We need to reduce the likelihood and impact of catastrophic cyber events. The Council's Security Operations Centre (SOC) is now well established and providing round the clock cyber threat monitoring, detection and prevention for some network and infrastructure assets. There is scope to broaden the range of assets protected in this way and take advantage of richer data made available via our implementation of enhanced Microsoft security features and functionality.

*Principle 3: Manage our data assets, and use them to derive business intelligence and insights for better outcomes for people and communities*

**Continue to develop, embed and promote a whole-Council Data Governance framework:**

The Data Governance framework will incorporate foundations for managing data as an asset, clarification of data accountabilities across the organisation and an operating model based on asset management pillars. It will establish a comprehensive approach for managing data assets throughout their lifecycle, from creation and capture to storage, usage, sharing and eventual disposal. The framework will help maintain and improve data quality and establish clear roles and responsibilities, assigning ownership and accountability, to prevent data silos and enable informed decisions. It is a key component for harnessing the full potential of our data assets, minimising associated risk and maximising potential value.

**Continue to implement and improve the capabilities of standardised data management and analytics tools across the organisation:**

Effective data asset management is dependent upon appropriate tools and technical capabilities being available, both to manage data and to use it for business intelligence and service digitalisation purposes. A central data repository for analytics and reporting, and standard analytics platform have been implemented, with a roadmap in place to further develop and extend capabilities.

**Exploit opportunities for delivering more services via, and deriving more intelligence from, our existing employee and customer information / platforms (TotalMobile and Granicus / Firmstep):**

The Council's online and mobile working platforms are now well-established as our tools for creating new digital service assets. IT will continue to work with Services to identify further opportunities for using these platforms to make more services available online and in our communities, and to deliver meaningful business change via automated / streamlined workflows and processes.

**Investigate opportunities for developing cross-Council Customer Services and Internet of Things (IoT) platforms:**

We need to investigate opportunities for delivering shared organisational solutions / platforms to address emerging demand for digital tools in a number of Council areas. A "One Council" platform approach will help us avoid potential duplication, inefficiency and siloed data. The first areas to be investigated are platforms for customer services and our IoT environment.

**Develop a blueprint for customer portal design, including clarifying how people who use Council services will interact with us digitally:** As more customer portals are developed by suppliers, it is important we develop a blueprint that sets out standards and principles around how these systems co-exist / align and for ensuring it is as easy and secure as possible for customers to login to multiple systems.

**Use information stored across the Council to improve the customer experience:**

Developing the Customer Services Strategy for a single 360 degree, end-to-end view of service users from data aggregated across a range of business system sources will give us a better understanding of customers' journeys when interacting with the Council. Our aim is to build a unified view of all customer touchpoints, across multiple channels, for improved customer experiences that deliver the right service at the right time, whatever the channel.

**Deliver a rolling programme for improving data literacy:** Data literacy, the ability to understand, analyse, interpret and communicate with data, is critical to effective data governance: employees need to understand the importance of various data management work practices and policies. A continuous awareness and education programme will be delivered, with content targeted at specific stakeholder groups.

*Principle 4: Build and embed “One Council” standards and approaches for the Council’s application and business systems landscape*

**Review and optimise the Council’s application landscape for improved governance, security, sharing, lifecycle management and efficiency.** The Council’s function specific business systems and applications are currently managed via a de-centralized model, making it challenging to embed organisational standards; leverage vendors / economies of scale or drive support efficiencies. A Business System Review is currently mapping our application estate as a first step towards highlighting opportunities for efficiencies via optimisation, rationalisation and building a more consistent, integrated framework for the lifecycle management of these assets.

**Review / strengthen processes for decision-making around new business system acquisition:** We need to ensure strategic / budget decision making for applications and business systems, including future planning around upgrades, moves to the cloud, replacement, integration, support and consultancy, is made on a whole-Council basis, to maximize value from investment in these assets. This will allow the Council to put in place appropriate, consistent pre-contract procurement, technical and security scrutiny and to prioritise finite support resources.

**Develop and embed a “cloud right” guide to standardize how we assess and manage opportunities for moving systems to the cloud at points of change:** Application vendors are increasingly using “next version up” incentives to impel customers towards cloud services. Each move to the cloud represents a significant change for our application and data assets. We need to develop standard approaches and checks for ascertaining security, data protection, accessibility, availability and costs relating to any move. We also need to ensure cloud solution purchasers clarify their ongoing responsibilities for data assets held in off-premise solutions and that these assets remain available for whole Council reporting, and repatriation at contract end dates.

*Principle 5: Evolve fit for the future digital classrooms to help our children and young people achieve their full potential*

**Continue to deliver and evolve schools' ICT network, infrastructure and computer replacement programmes / approaches to meet the needs of a modern learning and teaching environment:**

Consistent, equitable replacement programmes are embedded for learning and teaching-critical ICT equipment. Device standards and allocation criteria for school staff, children and young people will continue to be periodically and collaboratively reviewed, to take advantage of emerging technologies, meet changing education requirements and align with any joint digital strategies developed in conjunction with local Tayside or national education partners.

**Investigate opportunities for moving Education users (school staff and learners) to a dedicated Microsoft tenancy:**

A new PKC Education Microsoft tenancy is a pre-requisite for putting in place the sound digital foundations and modern systems needed to support PKC Education. It will enable fit for the future digital classrooms that help our children and young people achieve their full potential, by providing anywhere anytime learning and secure access to Microsoft and other learning and teaching tools.

**Evolve how school users; devices and applications are managed for improved flexibility, mobility, security and access to centrally held resources:**

An Education-specific Microsoft tenancy will deliver a more secure and user-friendly authentication experience, making it easier and faster for users to access their Windows devices and accounts. It will enable more streamlined user identity, device and access management, and improved business continuity arrangements, to provide continuing access to school resources in the event of any return to remote learning.

**Develop approaches and solutions to support national and local initiatives for pupil one to one device provision:**

Education and Children's Service is ambitious to move, over time, to one to one devices for Perth and Kinross pupils. The Scottish Government is also committed to supporting access to a device for every learner. It is important that schools' infrastructure is developed and grown in preparation for meeting the connectivity and support demands generated by any significant increase in device numbers. Resource implications for increased device and user support requirements will also require to be recognised when this programme is initiated.

**Evolve school broadband and Wi-Fi connectivity to meet growing demand:** Demand for connectivity in classrooms continues to grow as device numbers increase and

more resources and activities are accessed online. IT will continue to implement fibre, where practicable and affordable, to provide greater bandwidth, reliability and improved user experience. Wi-Fi density coverage in Primary schools will be reviewed to take into account Education and Children's Service's one to one device ambitions.

**Embed and deliver an equitable Audio Visual replacement programme:** A rolling programme has established standard interactive or display panels in all Perth and Kinross Council classrooms. A consistent, fully funded replacement programme needs to be embedded to ensure children and young people continue to have access to audio visual equipment that meets the needs of modern learning and teaching.

## *Principle 6: Contribute to the Council's net-zero commitments*

**Look for innovative opportunities for minimising electronic waste and making the Council's infrastructure sustainable and efficient:** New technologies give us innovative opportunities for reducing the environmental impact of Council operations. Internet of Things (IoT) / smart technologies are being deployed to support Services move from reactive to preventative ways of working, in areas such as fuel poverty, where IOT sensors are automatically capturing data about CO2, humidity and temperature within the Council's social housing stock. This will support more energy efficient management; quicker identification / rectification of defects; and more effective targeting of services and resources. Further activities will include IoT sensors to monitor Legionella in Council properties and bin sensors to reduce the number of vehicles on the road.

**Continue to explore opportunities for reducing our datacentre footprint, by moving services and applications to off-site / hosted datacentres, at points of change:** The Council's Datacentres act as central hubs for critical services: it is likely that some datacentre presence will remain essential to our digital infrastructure. However, the Digital Board has endorsed a "cloud right" approach for moving applications and services to the cloud, where appropriate at points of change: we will continue to monitor demand and to look for opportunities to reduce datacentre footprints as more of the Council's ICT/digital assets move to cloud-based models.

**Minimise electronic waste / lower power consumption via the use of energy saving technologies:** Smart procurement within established replacement cycles will help us take advantage of emerging technologies that consume fewer resources in the build and delivery processes, and less energy to run. We will also work with hardware vendors to identify emerging opportunities for asset recovery services that support the circular economy and reduce waste. Corporate and school device standards will reduce as far as possible the number of assets in use, whilst ensuring all users have access to the technology they require for their role.

**Continue to build our remote support capacity to minimise fuel-consuming onsite visits:** The IT HelpLine already uses remote management tools to resolve a high volume of user support requests at first point of contact. Our proposed fit for the future network model will significantly enhance capabilities for managing users, devices and access remotely, to reduce even further the need to travel on site.

Confident use of video conferencing set ups and MS Teams will continue to help employees avoid journeys to and between central offices, without compromising opportunities for peer support, collaboration and communication.



2023-2029

# Property Asset Management Strategy

## Strategy Introduction

For the purposes of asset management planning, the Property Asset is composed of operational and commercial buildings/sites and does not include council housing stock.

Since the last Property Asset Management Plan the environment in which the Council operates has changed considerably. Perth & Kinross Council's (PKC) aging population demographic and the increasing prevalence of remote working has and will continue to influence property asset management. An older population has differing requirements in terms of facilities within their localities, while the rise of remote work prompts the reconsideration of office space design and location. Understanding the changing environment and being prepared is essential and creates a need for focus on affordability, carbon neutrality and a locality-based approach.

This presents challenges and opportunities to drive change and examine how the Council delivers services, and the infrastructure needed to support that delivery.

This strategy and related plan adhere to the overarching approach articulated within the **Corporate Asset Management Framework (CAMF)**; in terms of Property, it is made up of three separate sections:

- Corporate Asset Management Policy & Strategy
- Property Asset Management Strategy
- Property Asset Management Plan

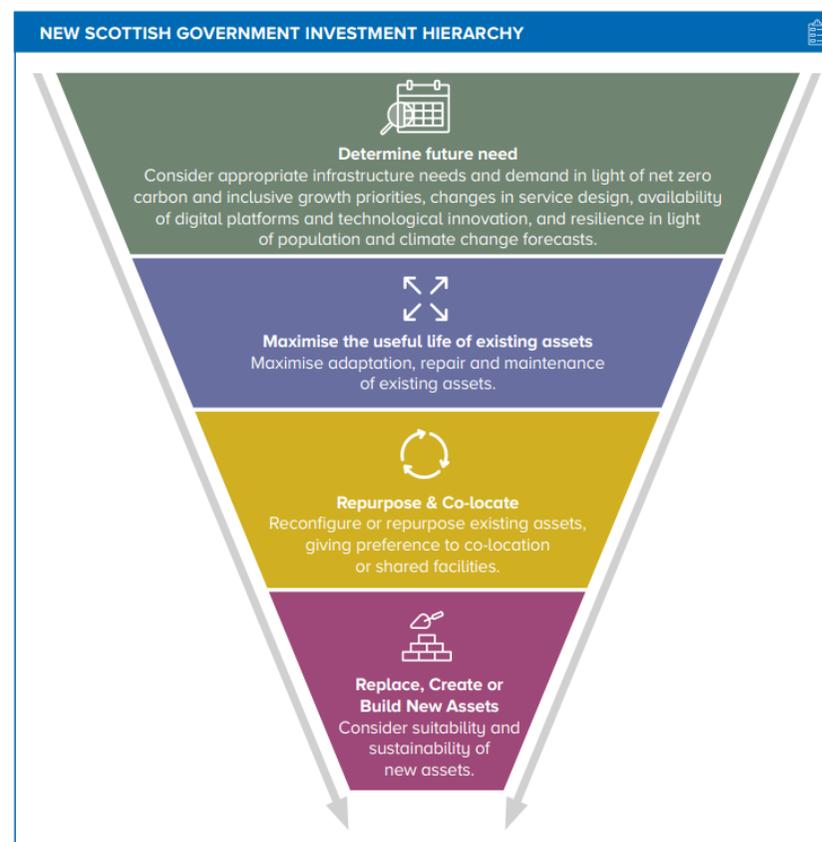
The CAMF provides an organisational approach to asset management via corporate adherence to the following asset management principles, which are informed by those approved by the Strategic Planning and Resources Committee in November 2018:

- All assets are considered as being corporate
- Assets will be identified and accurately recorded and managed via appropriate systems, to ensure they are as accessible as possible to all services/service users
- Assets will be safe, statutorily compliant, and economically and environmentally sustainable

- Where appropriate, benchmarks will be established, and assets reviewed against these to aid investment planning
- The utilisation of assets will be maximised, meet communities' needs and support future service delivery

This document aligns with Education & Children's Service's (ECS) Learning Estate Strategy and Management Plan ([LEMP](#)), which was approved November 2021.

This document is also supported by the Climate Action Plan and the release of the Scottish Government's National Mission with Local Impact: Infrastructure Investment Plan for Scotland 2021-22 to 2025-26 underpins this strategy:



There is a “golden thread” that connects this Property Asset Management Strategy to the overarching Community Plan (Local Outcome Improvement Plan) vision of “A Perth and Kinross where everyone can live life well, free from poverty inequality”

This thread is illustrated below:

## Local Outcome Improvement Plan (LOIP)

*A Perth and Kinross where everyone can live life well, free from poverty inequality*

Tackling poverty

In partnership with communities

Physical and mental wellbeing

Children and young people

Tackling climate change

Vulnerable people

Stronger and greener economy

## Financial Strategy

## Infrastructure & Investment Plan for Scotland

## Transformation & Change

## Strategic Investment Planning Framework

## Corporate Asset Management Framework

## Corporate Property Asset Management Strategy

## Vision & Principles

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In the current economic climate, there is a fundamental need for Perth and Kinross Council to transform the way we invest in and utilise our property portfolio. Future projected rises in revenue costs indicate that the current portfolio is unaffordable within existing budgets.

We must strategically realign to make the most of the buildings we have and dispose of those we no longer need.

In support of this our corporate Property Vision is:

**“To establish an affordable, sustainable and fit for purpose property portfolio, via locality-based asset challenge, that safely delivers Council services and Community outcomes”**

We will achieve this via the delivery of the Property Asset Management Strategy, which is designed to provide a coherent and structured approach to land and property asset management and support the Corporate Asset Management Plan in guiding PKC’s decision making.

In support of the vision, and adherence to the CAMF, six strategic principles have been established, these will guide decision-making and ensure the property portfolio is being utilised effectively:

1. To manage sites corporately, supporting the Council’s strategic priorities and principles
2. Commitment to decarbonising the property estate through proactive decision making and investment
3. Establish a baseline Property Estate that is affordable, safe, and fit for purpose
4. Review Assets with a Locality approach to Placemaking, enabling community and service provision led decision making
5. Work effectively with Partners to maximise shared opportunities
6. Promote inclusive economic growth and a vibrant economy

## Challenges and Actions

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These Strategic Asset Management Principles adhere to the principles of the Corporate Asset Management Framework and guide the Asset Management Plan:

### Principle 1: To manage sites corporately, supporting the Council's strategic priorities and principles

#### THE CHALLENGES:

- Ongoing Transformation & Change projects and Leadership review have created interim arrangements which are under ongoing review
- Dispersal of property and estate management across different areas of the business prevents a holistic and effective corporate approach
- Lack of complete asset data impedes data-led decision making and the creation of a dynamic 30-year property investment plan

#### WE WILL:

- Complete the Property Consolidation review as part of the Transformation & Change Strategy
- Adopt a Corporate Landlord model to ensure centralised corporate justification for the use of property assets
  - Support planning to inform the need, location and future property asset requirements
  - Explore co-location opportunities and optimisation of assets to deliver services whilst disposing of assets no longer required
  - Explore all options to accommodate One Public Estate
- Complete a review of all property assets to collect relevant condition, suitability, utilisation, value for money and climate change data to enable effective asset challenge and investment planning
  - Incorporate output programmes of work into the 6-year funded programme and 30-year Investment Plan

To manage sites corporately, supporting the Council's strategic priorities and principles

## Principle 2: Commitment to decarbonising the property estate through proactive decision making and investment

### THE CHALLENGES:

All buildings to be net zero carbon by 2045

75% reduction in emissions from buildings by 2030

Removal of all oil boilers by 2030

Delivering these works within an Operational Estate, with minimal disruption

Securing alternative funding streams to assist the transition to Net Zero

Change Behaviours and ways of working to maintain a focus on Climate Change targets

### WE WILL:

- Create a programme to assess and understand the net zero investment requirements
  - Review the property portfolio and reduce emissions through a combination of maximising and optimising the use of buildings in line with the Asset Challenge review and other Council Projects e.g. Working Smarter
  - Develop options, costs and funding avenues for PKC Estate Portfolios to reduce greenhouse gas emissions
  - All non - domestic buildings considered for refurbishment must have improved energy efficiency and performance, adopting the 'fabric first' approach by upgrading building fabric and incorporating non-direct emissions heat sources measures as standard to reduce heat demand and "in use energy" consumption to a level indicated in the Property Services Energy Project brief and Policy. These measures will also align with wider Scottish Government targets and LHEES duties to improve energy efficiency and meet future Net Zero emissions targets
  - Replace all oil-fired heating systems with non-direct emissions heat source, improving building fabric and enhancing heating control systems in accordance with LHEES duties and PKC Climate change KPIs
  - Increase level of smart metering for all utilities for improved monitoring and management
  - Undertake Building Assessment Reports (BAR) to determine the suitability of the PKC estate to connect to future heat networks. In accordance with Scottish Government Heat Network regulations
- Work with energy and utility suppliers to share ideas, discuss future solutions and partnership working in relation to energy supply and resilience
- Establish Business as usual Climate literate approach to management of built assets, to raise awareness and stimulate behavioural change
- Align with Corporate Climate Change KPI's to reduce annual energy consumption and increase local energy generation through renewable sources to maximise energy production

### Principle 3: Establish a baseline Property Estate that is affordable, safe, and fit for purpose

#### THE CHALLENGES:

- The property estate has a significant maintenance backlog, which is currently unfunded
- The GIA of our buildings is increasing without proportionate increase in revenue to manage and maintain properties
- Anticipated future expenses for operating, maintaining and investing in the current property portfolio are escalating exponentially
- We do not have established policy beyond the School Estate to define asset requirements
- Utilisation varies across the estate, and some assets are in poor condition and potentially unsuitable for their intended functions
- We do not have confirmation regarding the fulfilment of compliance tasks allocated to tenants or services

#### WE WILL:

- Complete a review of all property assets to collect condition, suitability, utilisation, value for money and climate change data for each asset, to enable effective asset challenge
  - Work with Strategic Leads to define service needs for property assets
  - Perform a comprehensive stakeholder analysis and engage in consultations to establish realistic and relevant asset challenge benchmarks for asset challenges across each data pillar and property category – these will inform investment/disinvestment proposals
  - Establish a programme of works, based on elemental condition rating and asset challenge, to address the existing maintenance backlog and maximise the estate, working with relevant colleagues to address funding issues
  - Utilise gathered data to further inform the 30-year Investment Plan, enabling effective lifecycle planning
- Continue to refine the analysis of running costs to better understand all property income and expenditure and prioritise investment
- Proactively manage surplus and long-term vacant buildings as part of proposed future closures
  - Review our existing approach to disposing of property assets, maximising opportunities for our communities to take ownership of key community buildings
  - Dispose of properties which have been vacant for over 12 months unless there is an approved exception
- Continue to work with Heads of Establishment (PKC and external) to establish a compliance monitoring regime that ensure risks are managed

## Principle 4: Review Assets with a Locality approach to Placemaking, enabling community and service provision led decision making

### THE CHALLENGES:

- The Scottish Government's National Planning Framework 4 was released in February 2023, this is to be disseminated into PKC's Local Development Plan 3 (LDP3) due 2027 – this includes the priority for 20-Minute Neighbourhoods and focuses on facilitating community empowerment
- Principles of Locality Working, Working Smarter, Community Planning and the 20-minute Neighbourhood are in the developmental phase, consequently the asset requirements for each locality remain undefined
- Complexity associated with integrating diverse community needs and Community Asset Plan outputs into asset reviews and deliverable outputs – want versus need
- Lack of full overview of locality-specific asset data impedes this process

### WE WILL:

- Work in cooperation with Planning colleagues to establish PKC's Locality-specific asset requirements
- Continue to engage with internal departments, public sector organisations, community organisations and other stakeholders to understand needs and asset collaboration opportunities
- Establish Property Services as Key Stakeholders within Locality Working Groups to promote alignment of Service and Community needs within each locality
  - Evaluate each Locality in alignment with Community Action Plans, fostering close collaboration with Community Partners
- Work with Planning and Community Partners to consolidate our locality-specific data
- Continue to facilitate a proactive approach to Community Asset Transfers and work with communities to promote increased utilisation of the estate

## Principle 5: Work effectively with Partners to maximise shared opportunities

### THE CHALLENGES:

- Ongoing budget pressures for all public services
- Demographic and social pressures are creating an increase in the demand for public services – with the economic downturn exacerbating this
- The complexities of joint working between public service organisations
- Understanding individual and community needs
- Ongoing like-for-like replacements of existing assets and the construction of new, single purpose assets within our localities

### WE WILL:

- Work with colleagues and partners to embed the principles of co-located service delivery, aligning with national best practice, as articulated in the 2011 Christie Commission and the 2020/21 30-Year Infrastructure Commission for Scotland Reports
  - Continue to work with Community Planning and Third Sector partners to establish public service delivery hubs across Perth and Kinross; contributing to a reduction in the overall public service estate
  - Work with other external bodies to identify opportunities for the establishment of local public service hubs
  - Continue to explore co-location opportunities and optimisation of assets to deliver services
  - Continue to explore opportunities for collaborative working with new and existing partners and external bodies

## Principle 6: Promote inclusive economic growth and a vibrant economy

### THE CHALLENGES:

- Understanding and maximising the contribution of our property estate to the development of inclusive economic growth
- Built asset provision is not uniform across localities, with some communities having less availability of suitable commercial real estate
- Some of our commercial estate is well located but not fit for purpose due to obsolescence and may require substantial reinvestment to upgrade
- Perth & Kinross Council recognise that there are local contractors and/or suppliers that due to the size or age of their business may find it difficult to bid successfully for large PKC contracts
- Delivering sustainable procurement and community benefits through investment in our property estate

### WE WILL:

- Establish a working group with Planning and Economic Development colleagues to ensure adequate provision within all localities and the rationalisation or renovation of surplus or unsuitable sites
- Address market shortcomings to cater for business needs within rural areas/communities
- Support the regeneration and development of our communities by working with them and the Economic Development Team to target investment in our land and assets
  - Work with relevant partners to identify opportunities within our property estate suitable for development of serviced employment land; and fit-for-purpose energy efficient commercial spaces
  - Work with relevant partners to identify opportunities within our property estate suitable for contributing to the repurposing of town and city centres to a more balanced mix of work, retail, leisure and cultural activities
- Continue to facilitate the Commercial Property Investment Programme (CPIP) in sustaining the generation of commercial capital receipts to continue to introduce diverse opportunities to the market
  - Explore income generation options and alternative funding avenues to support investment into redeveloping our portfolio
- The Procurement Team will continue to support local businesses to tender via working in partnership with the Economic Development teams to deliver on the initiatives such as those detailed in the Economic Developments 'Growing the Local Economy Action Plan'
- Ensure all Procurement adheres to Sustainable Procurement Policy, where PKC and suppliers work in partnership to support local communities in a measurable and sustainable way to maximise community benefits and supply chain development

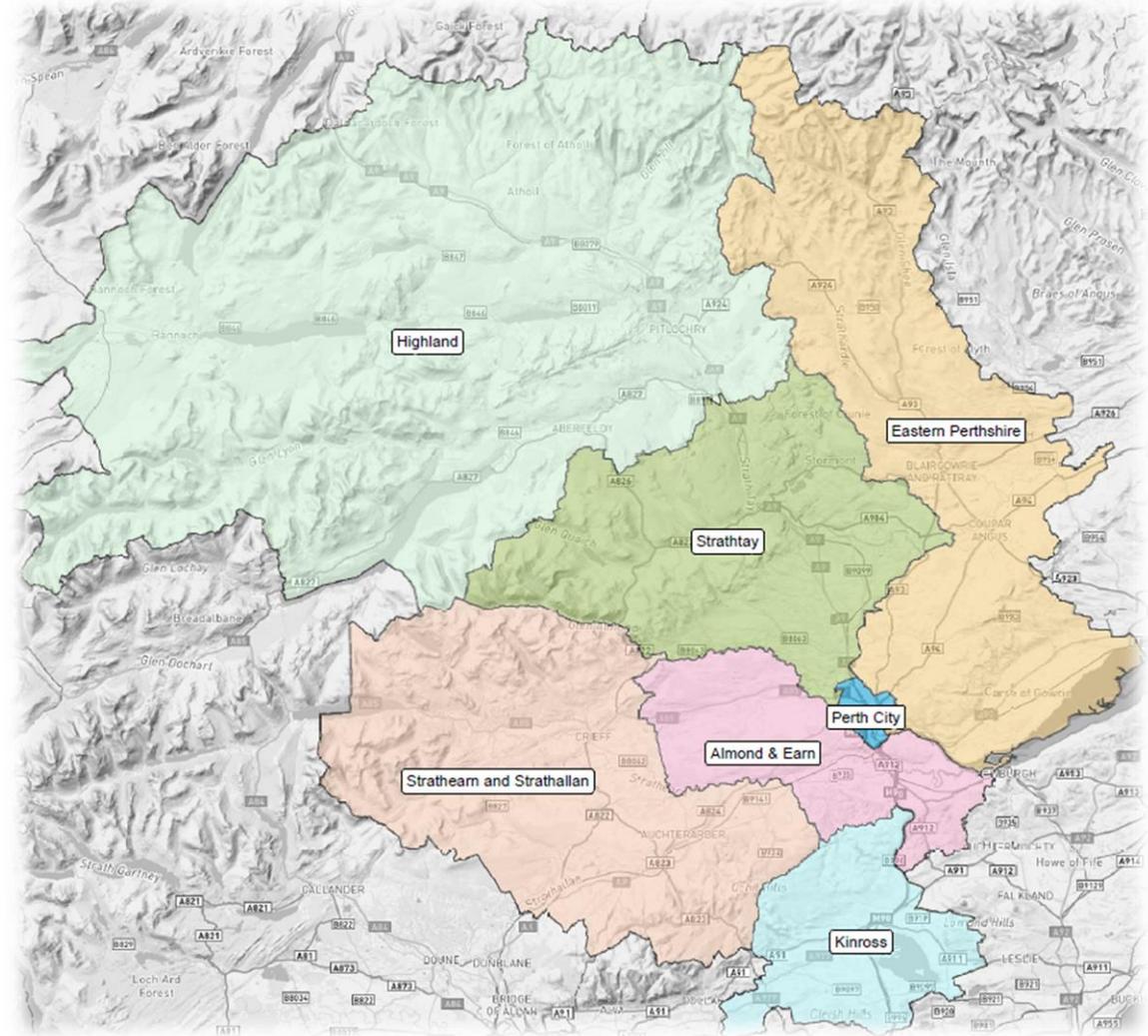


## Asset Overview

The Corporate Property Portfolio is organised into six overarching categories:

| Category                  | Description                                                                                                                    | Number     |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------|------------|
| Operational Buildings     | Built asset that has a public service is delivered from it e.g., 2-26 High Street                                              | 208        |
| Operational Sites         | Sites that deliver a public service which is more site based but may hold minor structures e.g., Auchterarder Recycling Centre | 492        |
| Non-Operational           | Income generating, socio economic or economic development sites/buildings/land                                                 | 207        |
| Assets Under Construction | Buildings which are under construction                                                                                         | 2          |
| Surplus                   | Buildings/sites formally declared surplus to requirements                                                                      | 14         |
| Vacant/ Partially Vacant  | Vacant or partially vacant buildings                                                                                           | 22         |
|                           | Vacant or partially vacant sites                                                                                               | 23         |
| <b>Total</b>              |                                                                                                                                | <b>968</b> |

|                          | Number of Operational |                       |
|--------------------------|-----------------------|-----------------------|
|                          | Buildings             | GIA (m <sup>2</sup> ) |
| Almond & Earn            | 6                     | 5,969                 |
| Eastern Perthshire       | 44                    | 60,304                |
| Highland Perthshire      | 22                    | 29,346                |
| Kinross-shire            | 14                    | 29,555                |
| Perth City               | 76                    | 193,003               |
| Strathallan & Strathearn | 31                    | 46,534                |
| Strathtay                | 15                    | 23,501                |
| <b>Grand Total</b>       | <b>208</b>            | <b>388,213</b>        |



Figures based on 2022/2023 financial year

## Key Factors Influencing Delivery of Property Asset Management

The management of our property assets is influenced by a variety of factors, which can be summarised as follows:

| External                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Internal                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• The current economic climate means that not only are there fewer resources to deploy in the management and maintenance of property, but lower receipts are also being generated from the sale of surplus assets.</li> <li>• Regulatory and statutory changes at both UK and Scottish Government level will occur throughout the life of this plan. These will be responded to and will affect how property assets are managed and improved.</li> <li>• Demographic projections indicate an increase in population within Perth &amp; Kinross, with the age profile becoming older. As a result, PKC's long-term property requirements may change.</li> <li>• Best practice guidance issued by professional organisations or other relevant bodies will be considered.</li> <li>• Property requirements of strategic partners may influence the delivery of joint projects.</li> <li>• Costs for energy, construction materials and professional advice will vary during the plan period with generally upward inflation pressures.</li> <li>• Community Empowerment, in particular asset transfer, is encouraged particularly where communities take responsibility for the management of local assets.</li> </ul> | <ul style="list-style-type: none"> <li>• Service modernisation and new ways of working mean that existing properties all need to evolve and be flexible in use.</li> <li>• Efficiencies in resource usage will be required to reduce in long-term operating costs.</li> <li>• The Council is committed to reducing carbon and improving energy efficiency. This will influence planned improvements and the construction of new assets.</li> </ul> |

## Baseline Position

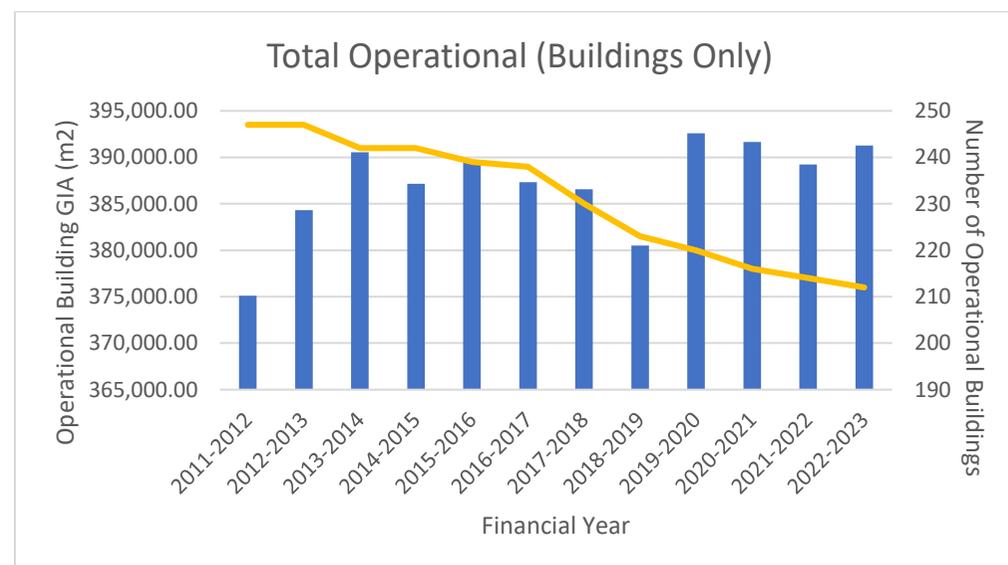
For capital accounting purposes the (unaudited) net book value of the portfolio as of 31 March 2023 is:

| Asset Type(s)                                                               | Additional Detail                                                                                                                | Valuation Basis                                                                                                                                                                     | Value               |
|-----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| <b>Operational Buildings, Operational Sites and Vacant/ surplus assets.</b> | Assets from which public services are delivered.                                                                                 | Represents a value for accounting purpose, rather than the value that might be realised from sales.                                                                                 | £687,001,000        |
| <b>Non-Operational Investment Buildings and Sites</b>                       | Assets which are leased out, or held as potential development sites, to solely earn rental income or achieve receipts from sale. | Valued at fair value, essentially reflecting the market price which would be received to sell such an asset in an orderly transaction between participants at the measurement date. | £15,015,000         |
| <b>Total:</b>                                                               |                                                                                                                                  |                                                                                                                                                                                     | <b>£702,016,000</b> |

Unprecedented increases in costs relating to construction, running costs and energy within the property sector has created a challenging situation for all local authorities. More than ever before, there is a fundamental requirement to review our estate, and ongoing liabilities, to ensure that all investment is effective and strategically guided. Key asset data in relation to size, building type, condition and suitability of the property estate are continually being captured and updated within the Corporate Asset Management System (Concerto).

This data, and its upkeep and improvement, enables data-led decision making and provides a foundation for PKC's future plans for managing and investing in the estate.

Over the last 11-years, targeted portfolio rationalisation projects, such as Service Needs and Property Issues (SNAPI), Perth Office Programme (POP) and Perth Office Accommodation Review (POAR), alongside disposal of unused assets, has resulted in an overall reduction of 35 operational buildings.



Within the same timeframe over 10,000m<sup>2</sup> of property has been added to the estate via new builds, extensions and Horsecross properties (Perth Theatre and Perth Concert Hall) and additional accommodation added in 2020 to support the school early years accommodation initiative.

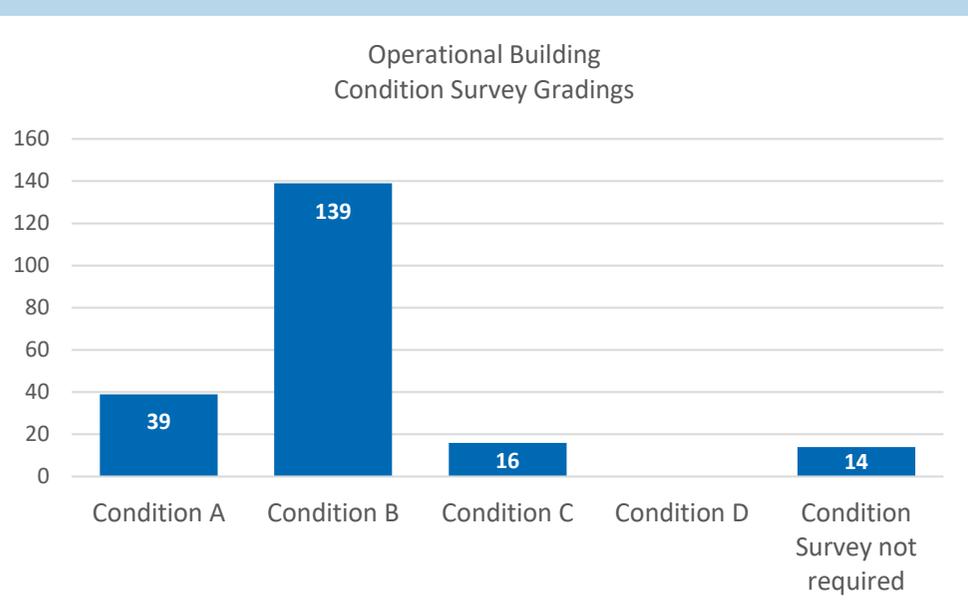
This demonstrates that although we are reducing building numbers, the average GIA is increasing and as newer buildings contain more complex maintainable equipment, the costs to maintain the estate (per m<sup>2</sup>) are steadily increasing.

## Condition

Condition is a measure of the current state of the fabric of a built asset, and with safety and security. Building condition is assessed in-line with [Scottish Government Core Facts](#) on a 5-year rolling programme with annual reviews, the output of these informs planned investment.

Each site's overall condition rating is calculated using elemental scoring and these individual ratings culminate in the overall grade.

### Most Operational Buildings are in Category B Condition:



The five year elemental investment requirements within each condition grading are:

| Condition Grading | Investment Requirements |
|-------------------|-------------------------|
| Condition A       | £14,460,010             |
| Condition B       | £116,143,394            |
| Condition C       | £5,371,361              |
| Condition D       | £0.00                   |
| <b>Total</b>      | <b>£135,974,765</b>     |

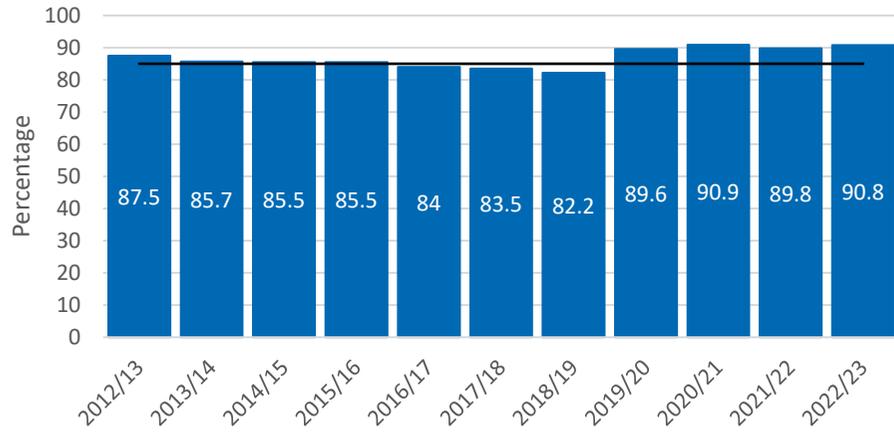
We are currently working with Live Active Leisure to align our condition survey approach, these sites are included within the "Condition Survey not required measure", they have anticipated additional investment requirements of £8,500,000.

The buildings range from new, purpose built to older stone buildings which require significant investment in construction, materials and maintenance to ensure their longstanding durability and functionality. We aim to plan for elemental asset refurbishment, therefore prolonging the life of the asset.

## Suitability

School suitability is assessed in-line with [Scottish Government Core Facts](#) on a 5-year rolling programme with annual reviews.

### Proportion of operational buildings that are suitable for their current use



Currently suitability data is only collected for the school estate, over the course of this plan all PKC service-led buildings will have bespoke Core Fact surveys created and completed to be used as a metric to ensure that facilities are fit for purpose and able to meet their operational need.

#### - The majority of the Property Estate is in Category B Suitability

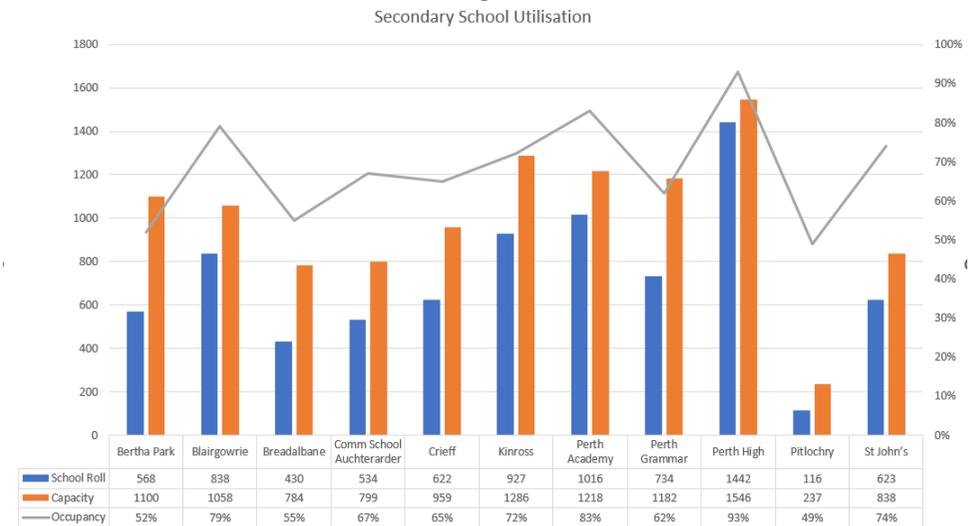
This is expected to change as we establish and complete suitability surveys beyond the school estate.

There are currently 7 operational school buildings in Grade C Suitability.  
There are currently no operational school buildings in Grade D Suitability.

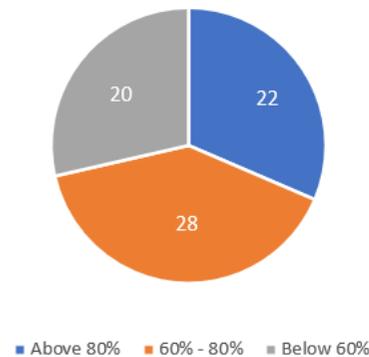
### Utilisation

Utilisation enables the assessment of the how and how well a built asset is being used

School utilisation figures are collected from Education and Children Services based on student roll figures and projections:



#### 2022/23 Primary School Utilisation



Utilisation data is not currently collected consistently within other services. The accurate and meaningful collection of building utilisation data has historically been problematic for all local authorities, and as such PKC do not currently have a prescribed method for collection. Buildings are expensive to maintain and operate, and across our estate many buildings are not fully utilised, resulting in non-beneficial investment costs to maintain under-utilised buildings.

An action within the Property Asset Management plan is to investigate the capture and review of utilisation data to bolster data-led decision making

### Value for Money

CIPFA has national value for money benchmarks, however currently not all Scottish Authorities input to these, therefore PKC are developing internal benchmarking for asset lifecycle costs.

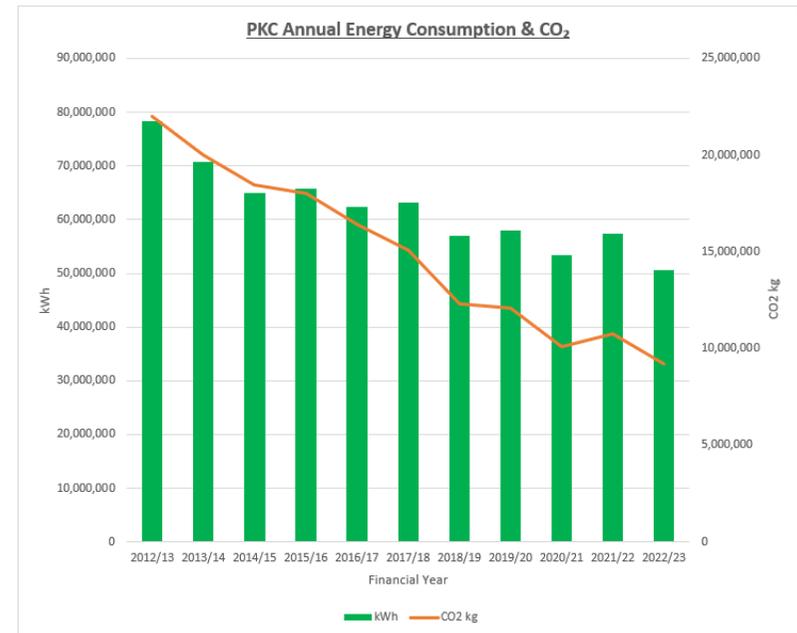
Modelling of historic costs per asset type and manufacturer is helping to inform future replacement dates and procurement decisions. This plan outlines how this approach will be further developed to provide internal benchmarking indicators.

### Climate Change

The Council has to meet the statutory requirements of the Climate Change (Emissions Reduction Targets) (Scotland) Act 2019.

This act requires a reduction of Green House gas (GHG) emissions with targets that require a 75% reduction in levels by 2030, to 4,396 tonnes, and to be Net Zero by 2045.

Our progress towards this is shown below:



Note: the number of operational buildings from 2012/13 – 2022/23 has reduced by 16% (reduction of 40) however the overall GIA (m<sup>2</sup>) of operational buildings has increased by 1% (3,371m<sup>2</sup>).

## Compliance

There are 6,779 planned preventative maintenance (PPM) actions required across the estate, with many of these re-occurring monthly. This is a growing list with additional legislation and requirements added periodically.

Ongoing assessments of both statutory and non-statutory compliance ensure the safety and adherence to appropriate property guidelines. For example:

- Equalities Act 2010
- Control of Asbestos Regulations 2012
- Electrical Safety
- Gas Safety
- Fire Safety Risk Assessment
- Water Hygiene and Safety (Legionella)
- Building Failure

Every building within the Property Estate requires an assigned Head of Establishment (HoE), tasked with ensuring the availability of all health and safety information relating to the building. They are also responsible for notifying line managers of any premises management concerns, and for ensuring the completion of obligatory statutory tests, such as the weekly fire alarm testing.

## Maintenance

Maintenance of the Property estate is split into 3 workstreams:

|                                         |                                                                                |
|-----------------------------------------|--------------------------------------------------------------------------------|
| <b>Reactive Repairs</b>                 | Priority ad hoc repairs resulting from failure or vandalism                    |
| <b>Planned Preventative Maintenance</b> | Programme of servicing to prolong lifecycle of essential plant and equipment   |
| <b>Planned Maintenance</b>              | Planned revenue improvements (such as painting, flooring, minor refurbishment) |

When considering new assets or increased operation of sites, the impact on maintenance requirements, and associated budget demand, should be considered as per the approved governance arrangements within the Strategic Investment Planning Framework.

## Maintenance Backlog

Maintenance backlog is a national, theoretical measure of the investment required to restore the asset to an as new condition within its current use.

The Property Estate has an estimated maintenance backlog of £194million, which affects overall property condition, suitability and related lifespan.

This figure has been calculated from building condition data using the following assumptions:

- Average elemental condition remedial costs per m<sup>2</sup> = £400
- 25% contingency for project preliminaries (e.g. site setup)

Maintaining the estate with this significant backlog presents increased risk to revenue and operational disruption risk.

## Cost of the Property asset

Detailed financial information relating to the costs of the property portfolio are captured and updated within the Corporate Property Asset Management System (Concerto) and via financial monitoring. Below is a summary of key information:

### The Investment Blueprint

In 2021 Perth & Kinross Council approved the Investment Blueprint, which sets out the rationale and key drivers for change. It provides five overarching principles to inform decision-making and direct the investment of public money where it is most needed. The principles are, that our investment decisions must: -

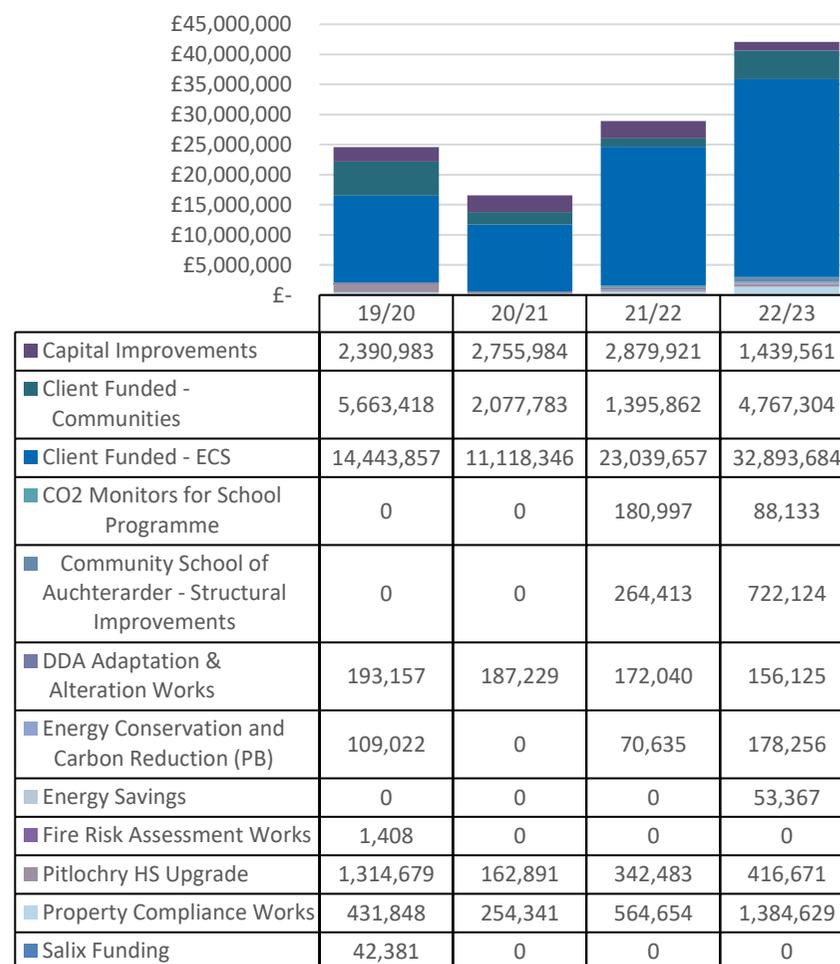
- mitigate against the impact of climate change
- promote inclusive economic growth and a vibrant community
- promote equality and
- support the delivery of sustainable public services through effective management of our assets
- promote and enhance digital inclusion

The Blueprint's function is to identify future investment priorities and to establish a more transparent and flexible approach to investment decision-making, ensuring that capital investment decisions support corporate objectives and priority outcomes.

## Capital

Property Services capital expenditure is illustrated in the chart below, total capital expenditure for 2022/2023 was £4,438,866:

Annual Property Capital Investment



## 6-Year Funded Capital Programmes

Capital Programmes are developed through Strategic Business cases and are drawn down, on a prioritised basis, to ensure the estate continues to be available for service delivery.

These programmes of work consist of Named Programmes of work and Named Projects, all programmes are reviewed annually and prioritised against a risk matrix to ensure that critical projects are delivered:

| Named Programmes                         | Purpose                                                                                                 |
|------------------------------------------|---------------------------------------------------------------------------------------------------------|
| Capital Improvements                     | Elemental investment in Property Fabric and Building Services for maintaining Building Condition        |
| Capital H&S Compliance                   | Investment required to ensure compliance with legislative changes and Property H&S Compliance           |
| Capital Equalities                       | Improvements to ensure accessibility and adherence to Equalities Act 2010                               |
| Investment in Learning Estate (liLE)     | The Delivery of ECS priority named projects for improvements in the Learning Estate.                    |
| Early Learning & Childcare               | Implementation of the Government edict for Early Years statutory allowance.                             |
| Commercial Property Investment Programme | The investment in industrial estates, business centres etc for business use to generate economic growth |

## Year Property Investment Plan

To enable consideration of pressures beyond the 6-year funded programme, a 30-year property investment strategy has been devised, founded on the lifecycle assessment of existing assets. This unfunded strategy serves as a tool for asset lifecycle planning and is therefore distinct from existing funded programmes. The primary objective of this plan is to provide an estate-wide perspective that anticipates investment needs, net of inflationary increases.

Due to the estimated £194m backlog, the plan incorporates a risk-based approach to ensure that buildings have a base level of investment until a major refurbishment or replacement is completed.

### Assumptions

This plan is based on best practice guidance relating to the anticipated lifespan of major building elements and the estimated design life of various construction types. These following assumptions have been made:

Buildings will be refurbished every 20 years (excluding public toilets, which will be refurbished every 10 years)

Buildings will be rebuilt within 50 years (excluding stone buildings)

Refurbishment and rebuilds will incorporate required Net Zero works

### Cost Assumptions

| All cost assumptions utilise average square meterage costs from completed or quoted works as of 2022/23 |        |
|---------------------------------------------------------------------------------------------------------|--------|
| Average Backlog (per m <sup>2</sup> )                                                                   | £500   |
| Average Maintenance Capital Costs (per m <sup>2</sup> )                                                 | £20    |
| Cost to rebuild (per m <sup>2</sup> )                                                                   | £5,000 |
| Cost to refurbish per (m <sup>2</sup> )                                                                 | £3,000 |
| Net Zero (per m <sup>2</sup> )                                                                          | £2,811 |

The plan projects a potential £2.22billion investment required over 30 years (2028-2058) to ensure buildings are maintained or replaced to Condition A/B.

This figure is inclusive of projected expenditure for major refurbishment and/or building replacements over this period, amounting to £2.14 billion, as well as a baseline budget of £82.5 million designated for maintenance. In instances where funding for extensive refurbishments or replacements is not achieved, the associated maintenance budget would need to be increased to sustain the life-expired asset, which would be maintained at a lower condition, with increased risk of unplanned failure).

The funding estimated within the 30 year plan is approximately double the average capital funding allocated over the past three decades and may pose affordability challenges. This plan does not consider inflationary increases, however in the past 30 years there has been an approximate 134.3% increase to investment costs as per the Retail Price Index (RPI).

The scale of estimated required investment highlights the need to carry out Asset Challenge within both a locality and service delivery context, to ensure that we do not make unnecessary investments in buildings that are no longer required.

## 30-Year Property Investment Plan

| Operational buildings                                       | £Y 0-10          | £Y 10-20         | £Y 20-30               |
|-------------------------------------------------------------|------------------|------------------|------------------------|
| <b>Refurbishment/Capital Improvements</b>                   | 2028/29- 2037/38 | 2038/39- 2047/48 | 2048/49- 2057/58       |
| <b>Education &amp; Children Services (ECS)</b>              |                  |                  |                        |
| Secondary Schools (inc. Allthrough Schools and PPP/PFI)     | £ 141,491,769    | £ 505,224,579    | £ 93,507,012           |
| Primary Schools                                             | £ 263,540,618    | £ 111,675,180    | £ 236,456,520          |
| <b>Arm's-length external organisations (ALEOS)</b>          |                  |                  |                        |
| Culture Perth & Kinross                                     | £ 28,535,199     | £ 1,500,930      | £ 35,958,330           |
| Live Active Leisure                                         | £ 83,692,970     | £ 10,031,260     | £ 42,606,000           |
| Horsecross                                                  | £ 29,673,996     | £ 26,297,000     | £ 14,832,000           |
| <b>Communities/ CDS/ECS (non schools)</b>                   |                  |                  |                        |
| Office Estate                                               | £ 46,007,920     | £ 25,323,870     | £ 44,600,400           |
| Operational buildings including Depots, HWRCs, Staff Spaces | £ 85,262,340     | £ 5,155,900      | £ 56,024,900           |
| Public Toilets                                              | £ 1,544,110      | £ 1,491,450      | £ 1,491,450            |
| Multi-storey Carpark and Park & Ride                        | £ 46,907,300     | £ 500,800        | £ 28,144,380           |
| Other properties (Community halls, club rooms, CGS, etc..)  | £ 82,135,130     | £ 8,961,330      | £ 81,019,010           |
|                                                             | £ 808,791,352    | £ 696,162,299    | £ 634,640,002          |
|                                                             |                  |                  | <b>£ 2,139,593,654</b> |

|                                                                |              |              |                     |
|----------------------------------------------------------------|--------------|--------------|---------------------|
| <b>Lifecycle Capital Maintenance</b>                           |              |              |                     |
| Education & Children Services                                  | £ 24,150,101 | £ 25,711,733 | £ 25,981,213        |
| ALEOs                                                          | £ 1,123,850  | £ 1,123,850  | £ 1,123,850         |
| Operational Buildings for Communities/ CDS (Depots/ PCs/HWRCs) | £ 390,998    | £ 390,998    | £ 390,998           |
| Other Buildings (Public Halls/ CGS/ MSCP)                      | £ 736,108    | £ 736,108    | £ 736,108           |
|                                                                |              |              |                     |
|                                                                | £ 26,401,057 | £ 27,962,689 | £ 28,232,169        |
|                                                                |              |              | <b>£ 82,595,916</b> |

Combined 30 year

**£ 2,222,189,569**

## Revenue

In 2022-2023 the total revenue spend on running costs was £51,828,247 the split of this expenditure is illustrated below as percentage spend (Planned Maintenance captures essential Compliance and servicing costs):

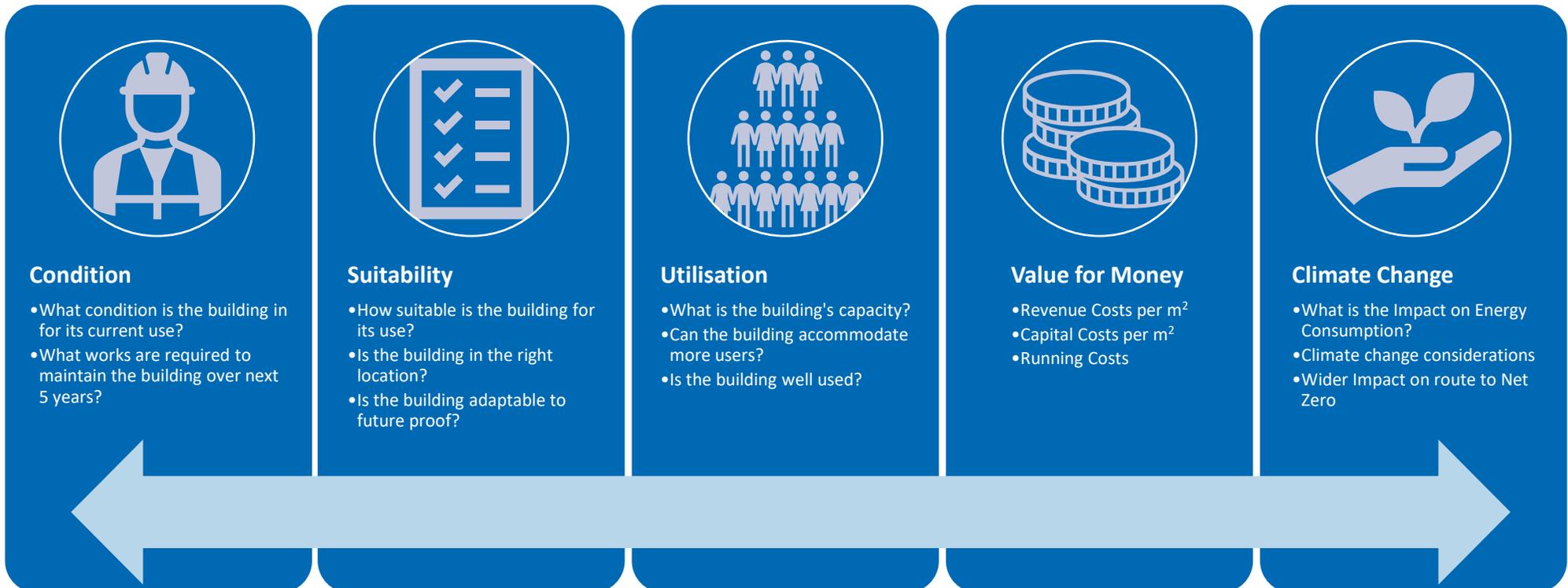
|                          | 22/23               | Percentage (%) |
|--------------------------|---------------------|----------------|
| Biomass                  | £ 98,457            | 0.2%           |
| Oil                      | £ 161,491           | 0.3%           |
| Security                 | £ 191,009           | 0.4%           |
| Insurance                | £ 401,179           | 0.8%           |
| Rent                     | £ 431,506           | 0.8%           |
| Grounds Maintenance      | £ 435,468           | 0.8%           |
| Water                    | £ 836,758           | 1.6%           |
| Unplanned Maintenance    | £ 2,166,819         | 4.2%           |
| Caretaking               | £ 2,220,079         | 4.3%           |
| Gas                      | £ 2,312,357         | 4.5%           |
| Planned Maintenance      | £ 2,549,269         | 4.9%           |
| Electricity              | £ 2,976,558         | 5.7%           |
| Cleaning                 | £ 4,024,636         | 7.8%           |
| Rates                    | £ 8,034,912         | 15.5%          |
| Service Charge (PPP/PFI) | £ 24,987,749        | 48.2%          |
| <b>Grand Total</b>       | <b>£ 51,828,247</b> | <b>100.0%</b>  |

## How We Will Inform Investment - Asset Challenge

In line with our Corporate Asset Management Strategy, and related principles, we will ensure that investment within the property portfolio is effectively targeted via the undertaking of an assessment and challenge of all property assets:

- as a key part of annual benchmarking
- as a key part of the annual capital budget process
- as a key part of the annual revenue budget process

This process will be applied as outlined below:



## Using the Asset Challenge Model

Any proposals that require investment or change the use of an existing building such as Leases, New Build, Refurbishment will prompt an **Asset Challenge** and be considered within the context of a locality review. Prior to progressing any investment requests, data will be collated and reviewed to ensure that the proposed course of action is the best method to meet the service or community need.

Annual monitoring and review of property assets will be completed to ensure that they meet agreed standards:

|                                                    | Condition<br> | Suitability<br> | Utilisation<br> | Value for Money<br>                                                                                                                                                                                                                                                                                                                                                                                                                               | Climate Change<br>                                                                                                                                                                                                                                             |
|----------------------------------------------------|------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>School Estate</b>                               | A or B                                                                                         | A or B                                                                                           | Min. 60%, ideally >80%                                                                            | <p>Scottish Futures Trust's 2019 Learning Estate Investment Programme (LEIP) recommended investment benchmark is £47 maintenance spend per m<sup>2</sup> to maintain building stock from deteriorating below a B condition rating, after refurbishment or new build</p> <p>This is not achievable within current budgets</p> <p>Value for money will be assessed based on internal benchmarking against median property costs and proposals assessed on Return on Investment for Community Benefit and Service Delivery Outcomes</p> | <p>Accurate benchmarking requires approved Scottish Energy Officer Network (SEON) Benchmarking against individual building layout and use factors</p> <p>Any extensions, alterations or new build will not adversely affect current consumption</p> <p>Climate resilience will be detailed as part of condition surveys and future investment</p> |
| <b>Office Estate</b>                               | A or B                                                                                         | A or B                                                                                           | Min. 80% include co-location and hot desking                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                   |
| <b>Community Centres</b>                           | A or B                                                                                         | N/A                                                                                              | Bookings and Lets-over 70%                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                   |
| <b>Adult Social Care &amp; Children's Services</b> | A or B                                                                                         | A or B                                                                                           | Residential occupation >75%                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                   |
| <b>Cultural Facilities</b>                         | A or B                                                                                         | N/A                                                                                              | SLAs- footfall                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                   |
| <b>Depots</b>                                      | A or B                                                                                         | A or B                                                                                           | Vehicles/ Tonnage                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                   |
| <b>Sports &amp; Leisure Facilities</b>             | A or B                                                                                         | N/A                                                                                              | SLAs- footfall                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                   |
| <b>Transportation</b>                              | A or B                                                                                         | A or B                                                                                           | Revenue income and Transportation strategy                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                   |
| <b>Other Operational Facilities</b>                | A or B                                                                                         | Specific to building type                                                                        | Specific to building type                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                   |

## Asset Challenge Data Pillars

Historically KPIs have been established on only Condition and Suitability factors, the adoption of the Asset Challenge model provides a more rounded overview and introduces several new benchmarking factors that will be considered as part of estate rationalisation, these have been summarised below:

**Agreement of benchmarks and collation of this data forms a key part of the action plan as it is required to complete a thorough Asset Challenge.**

| Data Type              | Current Performance against Asset Challenge Benchmark                                                                                                                                                                                                                                                                                                                                                                                        | % Data gathered<br>*Operational buildings only         |
|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|
| <b>Condition</b>       | Within the current Condition Survey Programme 80% of the operational estate has been surveyed in alignment with the updated Scottish Government's Core Fact guidelines, the rest of the estate ratings require review and update - due to be finalised end of 2023                                                                                                                                                                           | 100% of applicable GIA within 5-year rolling programme |
| <b>Suitability</b>     | Currently weighted suitability surveys are only completed for the school estate; all other operational buildings are rated automatically as B. This will be collected for all Operational buildings that deliver services for Perth & Kinross Council.                                                                                                                                                                                       | 35.5% of operational buildings                         |
| <b>Utilisation</b>     | 23 Primary Schools below 60% minimum utilisation benchmark for Primary Schools.<br>3 Secondary Schools below 60% minimum utilisation benchmark for Secondary Schools.<br><br>This plan sets out an action plan to capture non-school estate information, seeking to ascertain all building users and opening times with benchmarks agreed for each property category so sites that are under/over utilised can be highlighted and optimised. | 35.5% of operational buildings                         |
| <b>Value for Money</b> | Per m <sup>2</sup> affordability characteristics are to be developed to determine deliverable benchmark criteria, as Scottish Governments £47 per m <sup>2</sup> figure is not achievable within current budgets.                                                                                                                                                                                                                            | TBD                                                    |
| <b>Climate Change</b>  | The Scottish Energy Officers Network (SSEON) has provided indicative benchmarking figures for energy consumption and carbon. 38 properties are currently performing below SEON Benchmarking.                                                                                                                                                                                                                                                 | 78%*                                                   |

## How We Will Inform Investment – Adherence to Strategic Principles

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The following pages are grouped into the six strategic principles set out within the Property Asset Management Strategy. They provide context and specific background information which has been used to create an action plan:

1. To manage sites corporately, supporting the Council's strategic priorities and principles
2. Commitment to decarbonising the Property Estate through proactive decision making and investment
3. Establish a baseline Property Estate that is affordable, safe, and fit for purpose
4. Review Assets with a Locality approach to Placemaking, enabling community and service provision led decision making
5. Work effectively with Partners to maximise shared opportunities
6. Promote inclusive economic growth and a vibrant economy

The document concludes with a Key Strategic Objectives Action Plan, which sets defines the key strategic objectives over the next 6 years.



*Principle 1: To manage sites corporately, supporting the Council's strategic priorities and principles*

**Complete the Property Consolidation Review as part of the Transformation & Change Strategy:**

The proposals of Corporate Landlord function are a major focus within transformation project for Property Consolidation, with specific understanding of governance and working relationships on all Property Asset decision making and responsibility.

**Adopt a Corporate Landlord model to ensure centralised corporate justification for the use of corporate assets:**

The Corporate Landlord approach is now commonplace within local authorities, with PKC already having adopted this on a small-scale. This approach provides structure to ensure a centralised corporate justification to the use of property assets, and challenges services to optimise utilisation and decision making within the Property estate.

The Corporate Landlord's function is to provide services with suitable accommodation and sustain and manage the associated land and buildings, in essence all building occupants are tenants of the corporate landlord.

In the past strategic property asset management has focussed on a pragmatic approach for the existing estate, to maximise occupation in the owned estate. However, within the new financial climate this approach needs to develop to a more strategic approach to assets with a view to rationalise and promote cohabitation wherever possible for operational buildings and to ensure the non-operational estate is reviewed for investment opportunities, Heritage responsibility or Community Empowerment in order to proactively plan for reduction in assets which are a liability with no proposed socio-economic use.

Provision of full-lifecycle management and optimisation of PKC's property assets requires development of the existing Corporate Landlord responsibilities to include:

- Acquisitions
- Development
- Disposal of Land and Buildings
- Asset Planning, challenge, and review

- Review and Approval of items for Property Capital Programme
- Compliance & Reactive Maintenance Responsibilities
- De-carbonisation of the Property Estate
- Estates & Management of Investment Portfolio

This model offers an opportunity to centralise and rationalise Property Asset Management and Property Investment work streams across the local authority. Utilising this within a single model will improve decision making and governance and provide a singular focus on maintaining the condition, suitability, affordability, and optimisation of the Property portfolio while working towards a Carbon Neutral estate.

Fundamentally this will change the dynamic for future Capital bidding for asset improvements, allowing services to bring their operational knowledge to the technical Corporate Landlord to drive the proposals and delivery, whilst allowing for challenge on the wider corporate estate. With regards to revenue running costs, the model will allow for centralised control and rationalisation, removing the devolved budgets within services.

**Complete a review of all property assets to collect relevant condition, suitability, utilisation, value for money and climate change data to enable effective asset challenge and investment planning:** Data collection and management requires continuous updating and ongoing review and improvement of asset data and a bespoke approach for each asset type. Accurate and dynamic data is essential to guide effective decision-making and resource allocation. The maturity of our asset data will be recorded and monitored as part of the Corporate Landlord function.

## *Principle 2: Commit to Decarbonising the Property Estate through proactive decision making and investment*

The Climate Change (Scotland) Act 2019 set legally binding targets to achieve net zero greenhouse gas emissions by 2045, with interim targets requiring a 75% reduction by 2030, and 90% by 2040 from 1990 levels.

### **To meet these targets Perth & Kinross Council must take significant measures to mitigate the effects of Climate Change.**

To officially recognise the scale of the challenges faced by the Council an interim Climate Change report and Action plan were produced in 2019, these were updated again and adopted by the Council in Dec 2021. These reports involving all key stakeholders within the Council, highlighted major challenges and potential solutions. It was recognised as part of this process that significant societal and technological shifts would be required to move us from a carbon-based economy to a carbon free and resilient future. In practical terms it must be emphasised that significant financial investment will be required to respond to the challenges and meet the necessary Climate Change targets.

### **Programmes of work- Review, Assess and Improve**

### **All programmes of work across Perth & Kinross Council must take cognisance of Climate Change and the impact of any changes, alterations, or additional assets.**

Scottish Government through the Local Heat & Energy Efficiency Strategy (LHEES) have outlined a suggested hierarchy to identify which buildings could be prioritised for decarbonisation. This would involve providing non-direct emissions heating, local energy generation and building fabric improvements to reduce heat demand. The initial buildings in question are off gas grid with oil fired or inefficient electric heating systems.

Fortunately, this suggestion also formed part of the PKC Climate Change Action Plan for the non - domestic estate portfolio and was being developed before the introduction of LHEES. Initial funding of £2M has subsequently been made available to commence with this in a limited number of buildings. Further funding and resources will be required to ensure all oil-fired boilers are removed from the property estate by 2030.

As indicated Decarbonising the PKC estate to reach Net Zero will be challenging. A detailed assessment is currently being carried out on behalf of PKC by ARUP consultants. This project is being carried out in conjunction with the PKC - LHEES consultancy work and will provide high level costs and interventions required for the Council's current non-domestic estate portfolio to reach Net Zero.

The second phase of this project will also involve area-based assessments being undertaken to provide more detailed designs, energy models and solutions. This process will identify the specific building level interventions, timescales, and resources required to achieve the Council and Scottish Governments Net Zero targets.

Other programmes of work and existing actions being undertaken as part of the Climate Change action plan include the following:

**Smart Meter roll out** - Phase 1 is complete and Phase 2 is currently underway, working through all PKC Non-domestic buildings. This is being managed by Property Services, energy team in conjunction with EDF energy. This will provide more accurate data, improve energy management, and allow for more informed decisions to be made by the Council relating to energy efficiency and emissions reduction.

**Local Area Energy Plan + (LAEP+)** – This is an interactive digital platform being developed by Scottish and Southern Energy Networks (SSEN) in conjunction with key stakeholders such as PKC. This platform will allow assessments to be made for future expansion of the electricity network to cater for additional EV charging, local energy generation and electrification of heat within the local area. This also allows PKC to work more closely with SSEN in relation to energy supply and resilience.

**Principle 2: Commit to Decarbonising the Property Estate through proactive decision making and investment**

**Climate Change Working Group- Corporate KPIs**

The Council’s Climate Change Strategy and Action Plan accessed from the link below document further proactive measures required to align with Scottish Government targets.

[Climate change - Perth & Kinross Council \(pkc.gov.uk\)](https://pkc.gov.uk)

The Council’s Climate Change working group reports on established KPIs aligned to Government and local targets. Through this working group and new established governance on the following KPIs relating to the non-domestic Property Estate: -



|                                                                                                | Baseline Year | Baseline Value | Current Position | Performance |
|------------------------------------------------------------------------------------------------|---------------|----------------|------------------|-------------|
| <b>Scope 1 and 2 Emissions from Non -Domestic Council Estate (tonnes CO<sub>2</sub>e)</b>      | 2020/21       | 10658          | 9,226            | -13.44%     |
| Energy Consumption (kWh) reduction target                                                      | 2021/22       | 57324460       | 50,631,959       | -11.67%     |
| Heating oil consumption in PKC non-domestic estate (kWh)                                       | 2021/22       | 2040341        | 1,943,066        | -4.77%      |
| Renewable energy generated across the PKC estate, including from Low Carbon Heat Sources (MWh) | 2015          | 4035.04        | 2226.43          | -44.82%     |

achieve a Net Zero within the current PKC non-domestic estate were estimated at circa **£800million**. This further demonstrates a requirement to reduce unused and under-utilised assets to better focus investment, making the remaining assets more energy efficient and in turn reducing GHG emissions to meet the required Net Zero targets.

**Issues Tackling Climate Change**

Climate Change targets will not be achieved without additional funding, or it will place, a burden on other council services. With the formation of the Climate Change Board and Committee this has ensured that there is governance for any decisions that are made within this area of business. However there needs to be a firm commitment from all council services that any future investment should not increase energy consumption or GHG emissions. This may be challenging within existing budget responsibilities, as Net Zero projects typically tend to be more costly both in upfront Capital costs and ongoing revenue costs.

Without additional opportunities to proactively address the issues it is unlikely that the Scottish Governments Net Zero targets will be achieved by 2045.

Understanding the full scale and costs of reaching net zero is currently being investigated. Previous high level cost assessments indicated the works required to

*Principle 3: Establish a baseline Property Estate that is affordable, safe and fit for purpose*

**Complete a review of all property assets to collect condition, suitability, utilisation, value for money and climate change data for each asset, to enable effective asset challenge:**

A high-level review of data accuracy and comprehensiveness was undertaken in the creation of this document. However, a thorough gap analysis will be necessary to verify the viability and relevance of all data.

Historically the focus for asset data has been the School Estate, and therefore weighted condition surveys relate to school buildings. Property services will create process and procedure outlining how data will be collated across all property classifications in a way that ensures comparability and relevance.

The Asset Challenge model currently proposes indicative benchmarks per category, investigation is required to ensure agreement from all relevant stakeholders. Once benchmarks have been established and comparable data is available, Perth & Kinross Council will then be able to challenge the portfolio.

In terms of Affordability, the Scottish Government has established a benchmark of £47 per m<sup>2</sup> per annum (£27 revenue and £20 capital) for the maintenance of newly constructed schools, with the aim of ensuring that these buildings remain in Condition rating of A or B.

Utilising the £47 per m<sup>2</sup> figure, to maintain our current (operational buildings only) estate of 388,212.50 m<sup>2</sup> would require a recurring annual investment of £18,245,987.50, this would not address the backlog or investment required to meet the carbon neutrality goals.

PKC's current budget provision equates to £28 per m<sup>2</sup> per annum (£13 revenue and £15 capital) for existing properties, demonstrating a significant funding shortfall and explaining the anticipated decline in estate condition and rising maintenance costs.

Work will be undertaken to establish a steady state figure, with related benchmarking, in order to effectively challenge our investment and ongoing operational estate.

The collection of asset challenge data will be undertaken systematically, using a locality-based approach, to create an overview of an area and understand;

- Which services are available
- How and to what extent they are utilised
- If the building(s) are safe, fit for purpose
- If the buildings contribute to our net zero carbon goals

This systematic and quantified approach, in conjunction with the community requirements from the Big Place Conversation, will ensure rational, informed and balanced output.

**Establish a programme of works, based on elemental condition rating, to address the existing maintenance backlog and maximise the estate, working with relevant colleagues to address funding issues:**

The cost of construction and related services continue to increase into 2023. This is acknowledged as an industry-wide issue with multiple factors contributing to the grossly inflated costs; Brexit, the impact of Covid over the last 3-years and more recently, the war in Ukraine. The outcome is both direct and indirect cost increases associated with the delivery of core Property Services activities across Projects, Energy and Engineering, Compliance and Maintenance functions.

The journey to Net Zero and Climate change agenda adds additional maintenance pressure, as the lifespan of renewable technology is typically 2/3<sup>rd</sup>s of a conventional systems and have considerably higher installation and maintenance costs, which are not offset via energy cost saving.

Methodical [Asset Challenge](#) is crucial to reviewing and rationalising the property portfolio and ensuring that the estate is most effectively serving corporate and community needs in a way that is affordable and sustainable.

**Continue to refine the analysis of running costs to better understand all property costs and prioritise investment:**

We will work with the CIAM and Finance Teams to incorporate more data sources and improve the quality of the data provision. This iterative refinement will enable us to comprehensively evaluate all income and expenditure, facilitating informed decision-making.

**Proactively manage surplus and long-term vacant buildings as part of proposed future closures:**

We will continue to work with the Estates, Economic Development and Community Planning Teams to establish actionable plans for all currently unoccupied assets.

*Principle 3: Establish a baseline Property Estate that is affordable, safe and fit for purpose*

Existing Council owned properties which are no longer required to support an approved service delivery purpose, either by formal declaration or by disuse, will be disposed of in line with the Disposal of Land and Buildings Policy.

Currently there is no agreed timeframe between cessation of service delivery and surplus declaration, delaying the disposal or re-allocation of the asset. Property Services will work with relevant parties to create a Surplus Strategy with defined process and timelines

There is a presumption for swift disposal of surplus properties to minimise operational costs and maximise receipts, unless an effective economic alternative use can be demonstrated through a convincing business case.

Adoption of the proposed Corporate Landlord Approach will assist in streamlining this process with the empowered CPAM group able to declare assets surplus and follow an approved framework process to manage these (Appendix 2).

Assets are currently disposed of in line with the existing Disposal of Land and Buildings Policy (2013).

When disposing of a property there are statutory obligations to obtain Best Value, either:

Highest financial value, or

Less than best consideration where disposal satisfies strategic objectives (Economic development, Health, Social or Environmental wellbeing)

Currently there is no agreed timeframe between surplus declaration and disposal, delaying the disposal or re-allocation of the asset. Property Services will work with relevant parties to update this strategy to better service corporate objectives.

We are currently revising the existing disposal strategy to enhance its flexibility and promptness. We are also in the process of designing a more efficient process for managing surplus or vacant assets, with the aim of minimising their vacancy duration to minimise/remove associated security and maintenance expenses.

**Continue to work with Heads of Establishment (PKC and external) to establish a compliance monitoring regime that ensures risks are managed:** We will continue to work with Health & Safety and the CIAM Team to update PKC's HoE Handbook which will define clear compliance objectives, allocate responsibilities and implement a Concerto-aided structured monitoring process. To ensure ongoing compliance this will be regularly assessed and where required adapted to changing regulatory compliance.

**Principle 4: Review Assets with a Locality Approach to Placemaking, enabling community and service provision led decision making**

**Work in cooperation with Planning colleagues to establish PKC's Locality-specific asset requirements, Community and Service:** The National Planning Framework 4 (NPF4) is a strategic planning framework that guides long-term development and land use planning, it was released in February 2023. It, and its predecessor NPF3 form integral parts of our Local Development Plan:

- 20-Minute Neighbourhoods – seeking to ensure that all basic needs can be met within twenty minutes of non-motorised transport (to be reviewed in the context of rural communities).
- Local Place Plans which allow communities to set out their aspirations for the physical development of their community to meet local needs.
- The Place Principle which provides a framework for developing a shared vision for communities.
- The ongoing Local Governance Review has highlighted many examples of and opportunities for localised decision making, with subsidiarity at its core. A Local Democracy Bill is expected before 2026.

As NPF4 is integrated and delivered we will work with Planning colleagues to establish a model for Locality property asset review. This review model will surpass all prior reviews by comprehensively defining the range of resources required within in each locality, encompassing both commercially-operated and community-run facilities. The goal is to ensure each locality has appropriate, efficient and affordable property assets that align with, and fulfil, Service and Community needs.

**Continue to engage with internal departments, public sector organisations, community organisations and other stakeholders to understand needs and asset collaboration opportunities:** To ensure ongoing and effective inter-departmental collaboration we will continue to participate and seek guidance from the established Corporate Property Asset Management Group (CPAMG).

We will also continue to utilise the existing Chartered Institute of Public Finance and Accountancy (CIPFA) and other relevant professional groups to promote research, identify common objectives and discover areas where joint projects, shared

resources/knowledge and expertise could lead to mutual benefits and improve service delivery.

We will continue to engage with the community, we are involved in The Big Place Conversation, which forms part of the Local Development Plan (LDP) and in 2023. This is a conversation between the Council and the communities of the Perth & Kinross area that seeks to find out how residents use their locality and what is important to them. Outcomes of this, and the related LDP, will be used to guide investment decision making and asset planning.

**Establish Property Services as Key Stakeholders within Locality Working Groups to promote alignment of Service and Community needs within each locality:** We will utilise existing dialogue and collaboration between Services and existing Locality-specific Working Groups, emphasising the shared goal of enhancing service delivery and community engagement. These relationships will be employed to identify common interests and priorities that intersect between property management and community needs, enabling the alignment of existing community and council resources and infrastructure, ultimately seeking to enhance the effectiveness of our public services.

**Work with Planning and Community Partners to consolidate our locally-specific data:** By utilising existing dialogue and seeking to communicate with both internal community partners we will work to establish collaborative data-sharing and define standardised data formats and protocols for collection, storage, and sharing, potentially utilising Concerto to manage this. This collaborative effort seeks to provide a comprehensive, detailed and up-to-date dataset that supports informed decision-making and enhances the effectiveness of planning and community initiatives.

**Continue to facilitate a proactive approach to Community Asset Transfers and work with communities to promote increased utilisation of the estate:**

The Community Empowerment (Scotland) Act 2015 forms the basis for our approach to Community Planning. This is supported by the Perth and Kinross Offer which sets out how we, together with local communities, will deliver on our ambition to recognise that everyone in Perth and Kinross has something to offer.

*Principle 4: Review Assets with a Locality Approach to Placemaking, enabling community and service provision led decision making*

The Perth Offer seeks to challenge business as usual and empower and support communities. Within the scope of Property Asset Management this involves supporting communities' ambitions in relation to managing/owning a community facility. This can be achieved via legislation through Community Asset Transfer, in the form of a lease or full ownership, or via management agreements and leases.

## Principle 5: Work effectively with Partners to maximise shared opportunities

### One Public Estate Programme

Since the publication of the Commission on the Future Delivery of Public Services 2011 (Christie Commission) there has been an increased drive towards more collaborative working between community planning partners, third sector parties and communities to deliver better outcomes for people.

The Infrastructure Commission for Scotland Reports of 2020/21 further expanded on this approach highlighting and recommending the need for the more effective use of physical assets.

The Council is working collaboratively with partners on the One Public Estate Programme. The presumption of this ongoing work is that we must co-locate where possible, with all parties providing reasoning behind any refusal. Any feasible options are reviewed and progressed at a pace suitable for PKC.

This collective review of all public property estates seeks to ultimately reduce gross internal area and ongoing revenue costs. This collaboration also allows for review of service delivery and opportunities for improving output via working closely with partners.

### Police Scotland Co-location Localities

Building on the success of the co-location with Police Scotland in our Crieff Area Office, James Square, Crieff. We are investigating opportunities for further collaboration with Police Scotland across our localities.

### Working Smarter

The Council is undertaking a comprehensive review of office working across localities through its Working Smarter project. This is at a very early stage of development but will inform how hybrid working is implemented in the future.

As the project progresses opportunities for co-location and rationalisation will be explored.



## Principle 5: Work effectively with Partners to maximise shared opportunities

### Enabling Our Service Areas

There is a need to ensure a fundamental understanding and commitment across all service areas around reviewing their use and expectations of the property estate. Deployment of the Asset Challenge model will require a positive approach and effective change management to meet the Corporate Objectives and work towards a more sustainable and financially affordable operating model within the Built estate.

### Education & Children Services

Education & Children Services have set out through their Learning Estate Management Plan ([LEMP](#)), their strategy to improve the condition and suitability of schools alongside considering occupancy levels.

These are:

- *School Estate Transformation Programme.*
- *Investment - Capital Programme.*

The school estate makes up 68% of the Floor area of property assets, and as such, has commanded the majority of spend through Property Maintenance and Capital investment in the past.

Property Service is currently working in conjunction with ECS to review all current non-School ECS sites. This includes a review of designated office accommodation and Family Centre spaces across the estate, the goal is to rationalise and improve the current outdated provision.

### Direct Services and Operations

The Waste Services Team is responsible for forward planning to ensure waste infrastructure meets localities long-term strategic requirements, statutory obligations and national policy ambitions in regard to waste collection and disposal.

Direct Services (Operations) is responsible for the management of operational assets including Waste Depots and Transfer Stations, Household Waste Recycling Centres

(HWRCs), closed landfill sites, Public Toilet facilities and ancillary buildings associated with operational staff.

In Conjunction with Property Services a review of all the current Operations sites is underway to understand the current need and the future requirements for both Operations and how this impacts their sites.

The aim of the review is to develop a long-term strategic plan with key objectives to:

- ensure that the infrastructure is fit for purpose for both operational employees and the public for the next 20 years,
- meet statutory requirements and take account of current national policy requirements, including Zero Waste and Climate Change Strategies,
- maximise recycling and waste diversion performance and provide opportunity to future proof and accommodate anticipated service changes and population growth
- fulfil health, safety and welfare requirements
- optimise utilisation of the assets
- identify potential revenue reduction opportunities and better future cost certainty over planned preventative maintenance
- facilitate wider organisational change and corporate priorities such as the Perth & Kinross Offer, locality planning and corporate approach to assets and services, and
- establish a platform for partnering opportunities

### Health & Social Care Partnership

Health and Social Care Partnership's aim is to have accommodation that supports the delivery of integrated health and social care services within our localities.

Focus is currently on Perth City and is linked with ongoing work on the One Public Sector Programme and is seeking opportunities for co-location with partners.

The Partnership and affiliated health and social care services are currently under significant pressure to identify premises which will be suitable to deliver several key services in the short and long term.

## Principle 5: Work effectively with Partners to maximise shared opportunities

Property Services will work with the partnership to identify opportunities for asset sharing, to ensure communities have access to the right services across the local authority.

### HRA Non-Residential Estate

The Housing Revenue Account contains commercial properties (shops, offices and land) within its portfolio. These assets are currently being reviewed with data held on these properties being updated and audited.

These commercial assets are managed by Estates Team; however, the maintenance and investment is managed separately within Housing Services.

The savings through rationalisation or disposal is ring fenced by Housing Revenue Account.

Property Services will continue to work with Housing and Estates in seeking opportunities for co-location/collaboration involving these assets.

### Community Greenspace

Community Greenspace have a diverse remit within the context of the property portfolio such as: -

- Operational workshop/ storage space to accommodate operations teams in the localities
- Heritage & Bereavement services- Memorials, cemeteries, and churchyards
- Crematorium
- Pavilions and Changing facilities within parkland
- Westbank Depot- Unpaid Workforce and Nursery planting

Collaborative working between Property Services and Community Greenspace, with shared budgets and resources, has provided major improvements to the work within heritage and bereavement sites.

## Principal 6: Promote inclusive economic growth and a vibrant economy

**Establish a working group with Planning and Economic Development colleagues to share our data and ideas to ensure adequate provision within all localities and the rationalisation or renovation of surplus or obsolescent assets:** To promote efficient resource allocation and asset optimisation, we will establish a collaborative working group, or utilise the existing Corporate Property Asset Management Group, to serve as a platform for sharing data and strategic direction. The specific goal is to ensure aligned strategic investment, thereby enabling the rationalisation/revitalisation of our mutual assets.

**Understanding and maximising the contribution of our property estate to the development of inclusive economic growth:** The Estates and Economic Development Teams are responsible for managing PKC's land and property holdings, this includes the non-operational commercial investment property portfolio which is managed in accordance with the Property Investment Strategy 2022/23.

The updated strategy splits the non-operational portfolio into the following categories, with each requiring a different approach when deciding future management and retention policies:

| Category                              | Purpose                                                                                                                                                                                                                                         |
|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Economic development                  | Assets used to safeguard, control, and promote the use of land for economic development and regeneration.<br>(Commercial Property Investment Programme (CPIP))                                                                                  |
| Housing Revenue Account (non-Housing) | Non-dwelling properties held within the HRA that provide community facilities for council housing tenants (e.g., local shops and garages)                                                                                                       |
| Revenue generation (Investment)       | Assets held for rental income generation whilst generating an adequate and competitive return.                                                                                                                                                  |
| Socio economic                        | Assets held primarily for promotion or enhancement of the Council's 5 strategic objectives for securing the future.<br>Revenue generation for this category, although important and justifiable, is secondary to supporting Council objectives. |

*Note: Re-categorisation and update of Asset Management System is underway*

Property Services will proactively collaborate with our partners and colleagues to share the findings of our Asset Challenge process, identifying assets within our portfolio suitable for repurposing into serviced employment land, eco-friendly commercial environments, or to promote the assessment and transformation of surplus assets.

**Continue to facilitate the Commercial Property Investment Programme (CPIP) in sustaining the generation of commercial capital receipts to continue to introduce diverse opportunities to the market, via prompt response to market demands and conditions:** Property Services will collaborate with relevant stakeholders and provide our asset challenge outputs alongside our community and locality knowledge. This collaboration will contribute to the proficient management and targeted strategic investment in our property assets.

**The Procurement Team will continue to support local businesses to tender via working work in partnership with the Economic Development teams to deliver on the initiatives such as those detailed in the Economic Development's 'Growing the Local Economy Action Plan':** Property Services will continue to utilise approved procurement routes to market to obtain compliant pricing and contract terms. Asset requirements will be used to inform relevant procurement, depending on the specific needs and cost considerations. By continuing to optimise procurement practices, Property Services will ensure cost-effectiveness throughout the entire lifecycle of our assets.



2023-2029

## Roads Asset Management Strategy



## Strategy Introduction

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For the purpose of asset management planning the Roads asset covers Carriageways, Footways, Structures, Street Lighting, Traffic Management systems and Street Furniture.

Perth and Kinross Council is responsible for maintaining a road network with a Gross Replacement value of £3.66 billion. This makes the Road asset the Council's most valuable asset and the only one which is relied upon every day by every citizen and visitor alike.

Due to the rural nature of Perth and Kinross, and our central position within the trunk road network, our population has a car kilometre average of 12,547km per person per year. This is above Scotland's national average of 6,723km per person per year.

The population of Perth and Kinross is projected to increase, creating greater demands on the road network and associated infrastructure. Changes to demographics and how our communities live is likely to influence how we view our road network and impact how we design, build and maintain our roads in the future. To continue to meet public needs Perth & Kinross Council (PKC) must ensure that the road infrastructure is maintained efficiently and that the best value possible is achieved from allocated budgets.

Since the last Roads Asset Management Plan was published, the environment in which the Council operates has changed considerably, creating a need for focus on affordability and carbon neutrality. The Scottish Climate Change Plan 2018-2032 sets out a requirement for a reduction in car usage of 20% by 2030. This presents challenges and opportunities to drive change and examine how the Council delivers its services.

This strategy and related plan adhere to the overarching approach articulated within the **Corporate Asset Management Framework (CAMF)** and is made up of three separate sections:

- Corporate Asset Management Policy & Strategy
- Roads Asset Management Strategy
- Roads Asset Management Plan

The CAMF provides an organisational approach to asset management via corporate adherence to the following asset management principles, which are informed by those approved by the Strategic Planning and Resources Committee in November 2018:

- All assets are considered as being corporate
- Assets will be identified and accurately recorded and managed via appropriate systems, to ensure they are as accessible as possible to all services/service users
- Assets will be safe, statutorily compliant, and economically and environmentally sustainable
- Where appropriate, benchmarks will be established and assets reviewed against these to aid investment planning
- The utilisation of assets will be maximised, meet communities' needs and support future service delivery

This document is supported by existing strategies and policies:

- Road Maintenance Strategy
- Road Safety Inspection and Defect Categorisation Policy
- Street Lighting Policy
- Mobility Strategy (Draft)
- Climate Action Plan

There is a “golden thread” that connects this Roads Asset Management Strategy to the overarching Community Plan (Local Outcome Improvement Plan) vision of “A Perth and Kinross where everyone can live life well, free from poverty inequality”

This thread is illustrated below:

## Local Outcome Improvement Plan (LOIP)

*A Perth and Kinross where everyone can live life well, free from poverty inequality*

Tackling poverty

In partnership with communities

Physical and mental wellbeing

Children and young people

Tackling climate change

Vulnerable people

Stronger and greener economy

## Financial Strategy

## Infrastructure & Investment Plan for Scotland

## Transformation & Change

## Strategic Investment Planning Framework

## Corporate Asset Management Framework

## Roads Asset Management Strategy

## Vision & Principles

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Alongside most local authorities Perth and Kinross Council is facing challenges in maintaining a safe and reliable road network due to the economic climate, aging assets and increased public expectations of the levels of service.

To ensure that we have well-managed Roads asset that is fit for purpose, not only now but for future generations, the Road Asset Management Strategy seeks to maximise the efficiency, reliability, define service standards and improve how the asset is managed in order to minimise downtime, expenses and risk.

In support of this, our vision for our Roads asset is:

**“To have affordable, sustainable and well-maintained Roads assets within Perth & Kinross”**

We will achieve this via the delivery of the Roads Asset Management Strategy, which is designed to provide a coherent and structured approach to road asset management and support PKC’s investment decision making.

The strategy will direct decisions relating to procurement, maintenance and replacement and lead to improved operational efficiency and enhanced service delivery.

In support of the vision, and adherence to the CAMF, four strategic principles have been established, these will guide decision-making:

1. Work collaboratively to maximise shared opportunities
2. Utilise life-cycle management and proactively conduct preventative maintenance
3. To reduce our carbon footprint providing more sustainable procurement options whilst also improving infrastructure resilience and biodiversity.
4. The Roads Asset operates in a safe manner

## Challenges and Actions

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These Strategic Asset Management Principles adhere to the principles of the Corporate Asset Management Framework and guide the Asset Management Plan:

### Principle 1: Work collaboratively to maximise shared opportunities

#### THE CHALLENGES:

- To identify opportunities to work collaboratively with all stakeholders
- To align different works programmes to support better collaboration
- To align our budgets to support better collaboration

#### WE WILL:

- Use the Officer Public Realm Group to support more effective collaboration across Services and Teams
- Continue to work with Elected Members and our communities, where appropriate, to inform potential works
- Agree general code of practice with neighbouring Councils and Transport Scotland to ensure alignment of intervention levels and opportunities for collaborative working through Society Chief Officers Transportation in Scotland (SCOTS)
- Continue to work with the Tri-Council Roads Maintenance Strategy Group with Dundee City Council, Angus Council & Tayside Contracts
- Continue the Street Lighting Partnership – Tayside Contracts, Dundee City Council & Angus Council
- Continue to work in partnership with Dundee City and Angus Council for the traffic signal maintenance contract
- Explore opportunities for collaborative working with external bodies e.g., Amey plc/BEAR Scotland
- Collaborate with developers/ community groups in provision of technical approval to facilitate development in alignment with Perth Offer
- Continue to seek efficiencies with other bodies – Roads Authority & Utilities Committee Scotland (RAUCS) Statutory utilities working in an area

Work collaboratively to maximise shared opportunities

## Principle 2: Utilise life-cycle management and proactively conduct preventative maintenance

### THE CHALLENGES:

- To improve the level of our asset information data
- To have robust technical modelling tools for effective life-cycle planning
- To develop deliverable programmes of work based upon life-cycle planning
- Changing focus from reactive to proactive work to address the maintenance backlog

### WE WILL:

- Continue to review our asset data quality and where appropriate update to meet current needs
- Ensure that maintenance and management arrangements for all additions to the Roads asset base are clearly identified as per the approved governance arrangements within the Strategic Investment Planning Framework
- Continue to work with software suppliers and internal colleagues to develop life cycle modelling tools
- Establish prioritised matrices will be established for developing evidence-based programmes for Traffic Signals works
- Utilise the asset challenge process to assist in the development of programmes of work
- Incorporate our programmes of work into the 6-year funded programme and 30-year Investment Plan

Principle 3: To reduce our carbon footprint providing more sustainable procurement options whilst also improving infrastructure resilience and biodiversity.

**THE CHALLENGES:**

- No established benchmarking criteria to assist with decision making
- A perceived lack of consistent approach to climate change mitigating actions
- No carbon management tender assessment criteria developed for corporate use
- Lack of proven effectiveness of carbon-reducing measures
- Direct impact of climate change on the Roads asset

**WE WILL:**

- Seek guidance from the Climate Change Action Group on establishing consistent benchmarking criteria, and climate change mitigating actions
- Work with the Association for Public Service Excellence (APSE) to establish carbon neutrality performance indicators
- Consider the long-term environmental impacts of roads asset management decisions
- Continue to progress the LED Street Lighting Replacement Programme
- Incorporate Carbon Management scorings and weighting as part of our tenders, in liaison with Procurement Team PAS:2080
- Continue to recycle and re-use waste road layers
- Continue to seek recommendations and share ideas, discuss future solutions and partnership working regarding material de-carbonisation
- Review and refresh relevant asset inspections and assessments to take cognisance of climate related degradation to assets, including bridge scour and road embankment collapse risk

To reduce our carbon footprint providing more sustainable procurement options whilst also improving infrastructure resilience and biodiversity.

## Principle 4: The Roads Asset operates in a safe manner

### THE CHALLENGES:

Delivering a risk-based approach to identifying and dealing with hazards on the Roads Asset

To have a robust, risk-based inspection regime for the Roads Asset

Resourcing the relevant, skilled staff to undertake actions required to meet all relevant Codes of Practice Requirements

Increasing frequency and intensity of extreme weather events and associated damage and impact

### WE WILL:

- Continue to review and update inspection manuals and guidance to identify and assess hazards on the Roads asset
- Continue to undertake and record Roads Asset inspections in accordance with the approved regime
- Working with partners to identify opportunities to fill skills gaps and meet requirements of relevant Codes of Practice
- Continue to prioritise projects based on reducing risk to the travelling public, considering sole access and diversion route lengths
- Continue to invoke effective contingency plans to deal with extreme weather events
- Explore opportunities to employ developing technology in the review and management of our assets



## Asset Overview

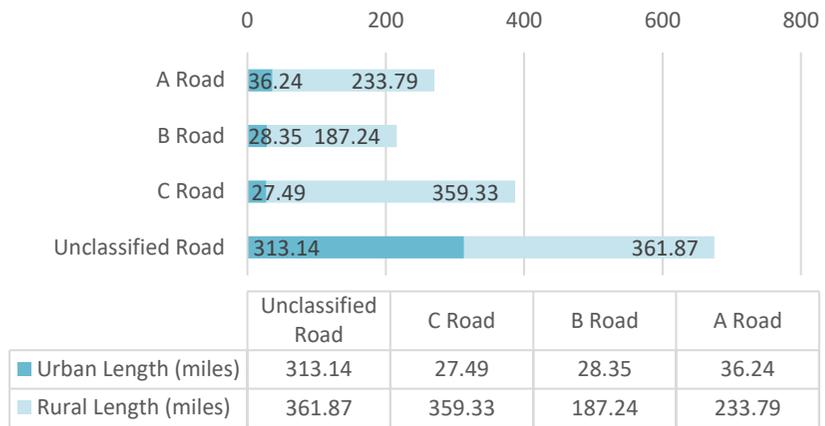
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The Road Network is composed of six inter-related categories:

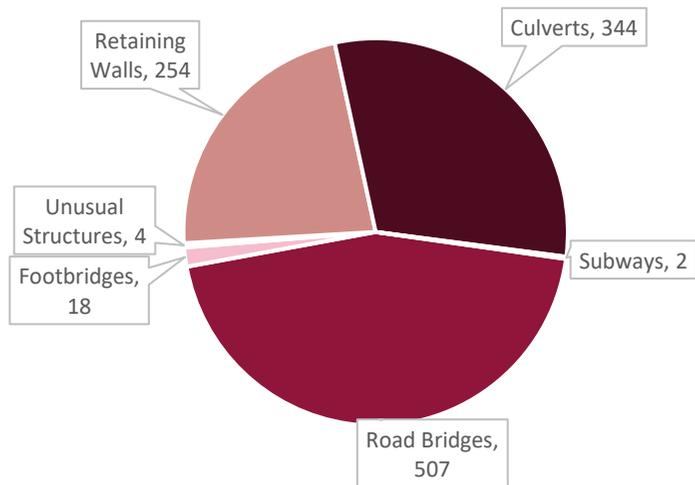
| Category           | Asset Detail                                                                            | Amount           |
|--------------------|-----------------------------------------------------------------------------------------|------------------|
| Carriageways       | A, B, C and U Classifications                                                           | 1,546 miles      |
| Footways           | Various surfaces                                                                        | 815 miles        |
| Street Furniture   | Safety Fences, Grit Bins & Weather Stations etc                                         | 70,187           |
| Street Lighting    | Columns<br>Luminaires                                                                   | 23,364<br>25,655 |
| Structures         | Culverts, Footbridges, Retaining Walls, Road Bridges, Subways, Unusual Structures       | 1,129            |
| Traffic Management | Traffic Signals (junctions)<br>Pedestrian Crossings<br>Other Traffic Management Systems | 57<br>96<br>201  |

This plan relies on the presently available inventory for Roads assets as at 31 March 2023.

### Carriageway Classification Group



### Structure Types



## Key Factors Influencing Delivery of Roads Asset Management

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The management of our Roads asset is influenced by a variety of factors, including:

| External                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Internal                                                                                                                                                                                                                                                                                                                                                                                                     |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• The plan is based upon “average” winter weather conditions. Severe winter weather and flood events will create higher levels of defects and deterioration than have been allowed for.</li><li>• Costs for construction, materials and professional advice will vary during the plan period with generally upward inflation pressures.</li><li>• Increased demand for active travel resulting in a requirement for more dedicated bus, cycle and walking areas.</li><li>• Initiatives such as development of 20-minute neighbourhoods and placemaking, changes the carriageway rationale from a focus on vehicular access to one of shared use.</li></ul> | <ul style="list-style-type: none"><li>• The Council is committed to reducing carbon. This will influence planned improvements and the construction of new assets.</li><li>• The ongoing programmes for structures; load capacity assessments, major inspections and scour assessments will identify new high priority projects, these may require additional staff and budget resource to deliver.</li></ul> |

## Baseline Position

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For capital accounting purposes the (unaudited) net book value of the Roads categories as at 31 March 2023 is:

|                    |                       |
|--------------------|-----------------------|
| Carriageways       | £2,288,648,000        |
| Footways           | £330,030,000          |
| Street Furniture   | £13,691,000           |
| Street Lighting    | £59,021,000           |
| Structures         | £267,710,000          |
| Traffic Management | £9,485,000            |
| Land Value         | £691,626,000          |
| <b>Total:</b>      | <b>£3,660,211,000</b> |

The original Roads Asset Management plan was approved by the Strategic Policy and Resources Committee on 17 June 2015 (Report no: 15/254 refers), since then unprecedented increases in costs relating to construction within Roads has created a challenging situation for all local authorities. More than ever before, there is a fundamental requirement to ensure that all investment is effective and strategically guided.

Key asset data in relation to asset type, lifecycle information, value for money and climate change is continually being captured and updated within the Roads Asset Management System (WDM).

This data, and its upkeep and improvement, enables data-led decision making and provides a foundation for PKC's future plans for managing and investing in the asset.

Street Furniture is a defined asset group however, due to its low value and minimal maintenance needs, the same level of data and strategic maintenance structure has not been established.

## Condition

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All assets must be in a safe condition in line with our statutory obligations.

For general asset management planning purposes, an asset is considered as life expired at the point where the retention of the asset is no longer considered as representing value for money. As a result of this, we may be able to retain assets beyond their anticipated replacement date.

However, generation-spanning assets (Carriageways, Footways and Structures) are designed to have long lifespans with no stated overall replacement date, instead individual elements of the asset are maintained. These asset categories require significant investment in construction, materials and maintenance to ensure their longstanding durability and functionality. We aim to minimise the need for complete asset replacement, therefore avoiding disruption to the operation and traffic flow and the related costs and inconvenience.

### Carriageways

An annual carriageway condition survey is carried out by the Scottish Roads Maintenance Condition Survey (SRMCS). This produces a Road Condition Indicator (RCI) which is used for developing planned carriageway maintenance and as a performance indicator.

A reduction in RCI figure is an indication of improved road condition, as this is a measure of works required.

The overall condition of the Carriageway has improved from 37.41% requiring replacement/improvement works in 2015 to 30.64% in 2022. In line with the approved roads strategy the condition of the A class network has improved from 37.41% in 2015 to 34.44% in 2022.

### Footways

Footway condition is assessed using the SCOTS RAMP Footway Condition Assessment methodology. In 2015 the percentage of footway identified for further investigation was 9.9%, in 2023 this is 8.7%, demonstrating an increase in overall condition.

### Street Furniture

At present, there are no established standards that specifically define condition requirements for street furniture. Therefore, PKC has not established any benchmarks relating to this asset category. Defects to street furniture assets are typically reported by the public, or identified during other safety inspections.

### Street Lighting

Street Lighting condition is assessed based on asset replacement lifecycle for lanterns and columns.

**Lanterns:** In 2015 the number of columns exceeding expected service life was 30.6%, this has decreased to 15.83% in 2023, demonstrating an improvement in overall condition, which is linked to the ongoing LED Replacement Programme.

**Columns:** In 2015 the number of columns exceeding expected service life was 19.86%, this has increased to 26.3% in 2023, demonstrating a reduction in overall condition. This has been caused by COVID-19 restrictions and lack of staff resource, with available resource focused on lantern replacement as these offer a saving.

### Structures

The ADEPT Bridge Condition Indicator system is used to report the condition of bridges. This system provides condition scores, which are presented as average and critical values.

**BCIAV: Average Stock Condition Indicator** – the weighted average of the individual Condition Indicator scores; this score provides an overview of the average stock

condition.

**BCICRIT: Critical Stock Condition Indicator** – the weighted average of the Critical Indicator scores. This score provides an indication of the criticality of the stock with regards to load carrying capacity.

The BCI system features a structure condition index, for condition-based performance indicators, with related percentage ranges detailed for classifications.

PKC's ADEPT scorings are displayed below:

|         | BCIAV        | BCICRIT      |
|---------|--------------|--------------|
| 2015/16 | 85.1 (Good)  | 74.77 (Fair) |
| 2022/23 | 83.67 (Good) | 71.93 (Fair) |

Structural assets condition has deteriorated year-on-year, £17.8million capital budget has been allocated to high-priority projects from 2023/2024–2027/2028.

Within the 2015-2023 Asset Management Plan condition benchmarks were established based on the overall ADEPT scores. Within the lifespan of this plan Structures will establish hierarchical, asset category specific benchmarks.

### Traffic Management

Condition is assessed based on estimated service life. In 2015 8% of assets had exceeded their estimated service life, in 2023 this has increased to 14%. This demonstrates a decrease in overall condition and an increase in maintenance backlog. A backlog funding solution is being developed.

## Value for Money

The SCOTS Performance Management and Benchmarking Focus Group works with the Association for Public Service Excellence (APSE) to produce annual performance indicator information.

This performance indicator information is used by PKC, and other local authorities, to create benchmarks to monitor performance and drive improvement, details of these are included in Appendix 2 - Service Standards.

For the purpose of benchmarking, the Scottish local authorities are split into family groups based on network length and urban/rural split. Perth & Kinross Council is in the Rural Family Group along with Aberdeenshire, Angus, Argyll & Bute, Scottish Borders, Dumfries & Galloway, Highland and Moray Councils.

PKC's collaboration with organisations such as Tayside Contracts, Utility Companies, and other Councils fosters integrated decision-making and the pursuit of efficiencies in work planning. This collaborative approach promotes joined-up thinking, streamlined operations and value for money.

In our business-as-usual data-driven decision-making, life cycle cost analysis, robust maintenance strategies and compliant and competitive procurement tendering processes are all designed to promote best value.

## Climate Change

Most roads assets have no established benchmarks for climate change monitoring. The SCOTS Performance Management and Benchmarking Focus Group works with APSE and other local Councils to agree these and enable annual monitoring. Updates to this will be reporting via the annual status report.

## Street Lighting

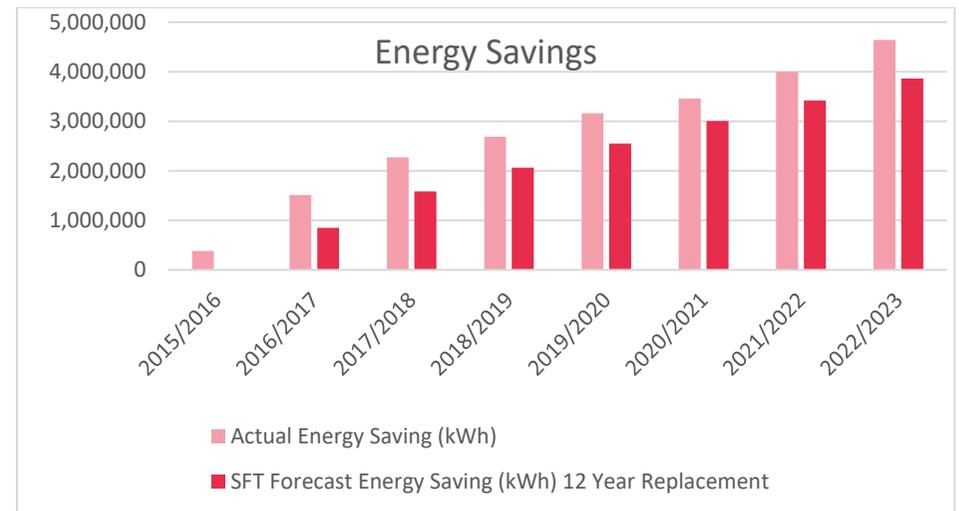
### LED Replacement Programme 2016/2017 – 2025/2026

Following approval by the Strategic Policy & Resources Committee on 23 September 2015 (Report 15/396 refers) to undertake a spend to save replacement of less

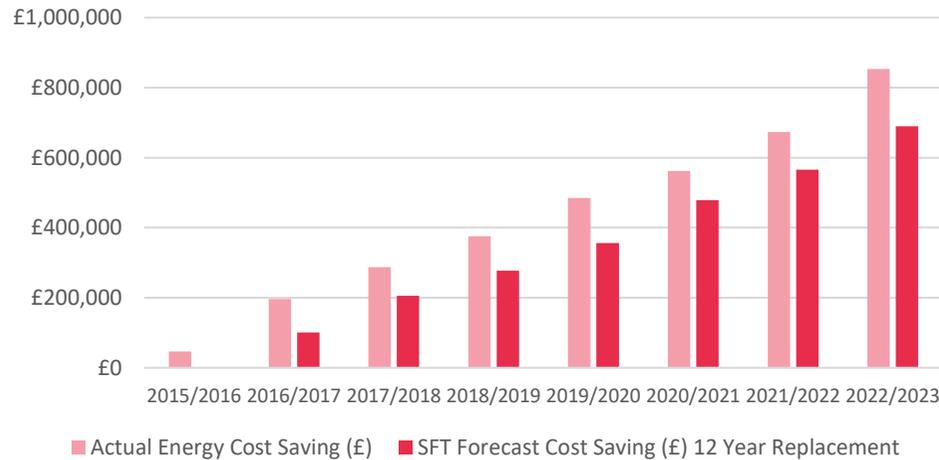
efficient street lighting installations and provide significant energy savings in terms of cost and CO2 emissions. Savings are being re-invested in column replacements:

|         | Planned Lantern Replacements | Actual Lantern Replacements | Planned Column Replacements | Actual Column Replacements |
|---------|------------------------------|-----------------------------|-----------------------------|----------------------------|
| 2016/17 | 1,500                        | 3,115                       | 375                         | 471                        |
| 2017/18 | 1,500                        | 1,725                       | 375                         | 414                        |
| 2018/19 | 1,500                        | 2,000                       | 500                         | 462                        |
| 2019/20 | 2,000                        | 1,700                       | 500                         | 282                        |
| 2020/21 | 2,000                        | 2,000                       | 500                         | 424                        |
| 2021/22 | 2,000                        | 2,000                       | 500                         | 413                        |
| 2022/23 | 2,000                        | 2,250                       | 500                         | 150                        |

The Street Lighting Partnership is currently 7 years into its LED replacement programme to drive down energy costs and replace the infrastructure in a planned, phased manner and delivery is ahead of programme. Current Actual Energy Savings are 4,637,664 (kWh) and Actual Energy Cost Saving is £853,285.



## Cost Savings



## Traffic Management

### Traffic Signal Lamp Replacement Programme

In March 2023 Traffic Management completed a spend to save programme of LED lamp replacements for existing traffic signal sites. 38 sites were retrofitted with LED lamps which has improved the condition of the assets and created annual savings of £8,280, due to reduced maintenance requirements and £9,768 in energy costs due to reduced power usage required for LED lamps.

### Compliance

All assets must be in a safe condition in line with our statutory obligations.

The duty to maintain the road network falls to the Council, as the Roads Authority, under the Roads (Scotland) Act 1984.

## Code of Practice

PKC's approach is based on 'Well-Managed Highway Infrastructure - A Code of Practice (October 2016)', published by the UK Roads Liaison Group, which recommends a 'risk-based approach' to managing assets, including routine inspections and repair programmes.

## Inspections

Inspections are required to identify and prioritise defects and so minimise, as far as reasonably practicable, exposure to danger or serious inconvenience to users of the road network or the wider community. Each asset group has specific inspection types and frequencies:

| Asset Category  | Scheduled Inspection Type                                                                                                     | Number/Frequency                                                           |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|
| Carriageways    | Safety Survey Inspections                                                                                                     | 374 (covering 1,546 miles of carriageway) frequency dependant on hierarchy |
| Footways        | Footway Safety Inspections (Walked/ Driven)                                                                                   | 221 (covering 814.5 miles of footway) frequency dependant on hierarchy     |
| Street Lighting | Electrical Safety Inspections (Statutory Electricity at Work Regulations and BS7671 IET Wiring Regulations) of Luminaires.    | 25,123 assets inspected within a 6-year cycle                              |
| Structures      | General inspections are to be carried at intervals not exceeding 24 months from the previous General or Principal Inspection. | 875 assets inspected within a 2-year cycle                                 |
|                 | Principal inspections should be carried out at intervals not exceeding six years from the previous Principal inspection       | 875 assets inspected within a 6-year cycle                                 |

|                    |                                                                                                                                                            |                                                                                            |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
|                    | unless a risk assessment has been carried out to determine an alternative interval or inspection regime.                                                   |                                                                                            |
| Traffic Management | Electrical Safety Inspections (Statutory Electricity at Work Regulations and BS7671 IET Wiring Regulations) of traffic junctions and pedestrian crossings. | 114 assets receive annual electrical tests and annual visual inspections of the equipment. |

As per COP requirements, all identified works are risk assessed by the relevant team and ranked for completion primarily on the basis of reducing risk to the travelling public.

### Structures

Risk assessments for structures are consistently revised to account for any alterations in the condition of the bridge inventory. Structures will continue to use this approach as required by the Code of Practice, to address the large backlog of high priority reactive works and in due course move towards preventative maintenance where rankings will allow for hierarchical gradings of structures types. Timescales for this shall be set out in programmes of work required to deliver the outcomes articulated in the Structures Maintenance Strategy, which is currently being developed.

### Maintenance

Due to the level of investment and maintenance required on the Roads generation-spanning assets (Carriageway, Footways & Structures) maintenance is funded via both Capital and Revenue budgets.

Maintenance can be summarised into the following, asset category specific, headings:

| Maintenance Types                 |                                                                                                                                                                                                                                                                                                                                                    |
|-----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Preventative                      | Surface Dressing<br>Base patching/preparatory Works for Surface Dressing in future years                                                                                                                                                                                                                                                           |
| Corrective                        | Thin/Micro Surfacing (<25mm)<br>Thin Overlay/Resurfacing (25-60mm)<br>Moderate Overlay/Resurfacing (60-100mm)<br>Structural Overlay/Resurfacing (100mm +)<br>Kerbing<br>Reconstruction<br>Carriageway patching (permanent)<br>Reactive<br>Other Routine e.g. Sandbags, Diesel Spills, Signs<br>Coal tar testing & removal<br>Drainage Improvements |
| Cyclical                          | Gullies & Drainage Channels Cleaned<br>Road Markings Renewed<br>Choked Gullies Cleared                                                                                                                                                                                                                                                             |
| Footway Treatments                |                                                                                                                                                                                                                                                                                                                                                    |
| Preventative                      | Surfacing Treatment                                                                                                                                                                                                                                                                                                                                |
| Corrective                        | Resurfaced<br>Planned Patching<br>Reconstruction                                                                                                                                                                                                                                                                                                   |
| Street Furniture Maintenance Type |                                                                                                                                                                                                                                                                                                                                                    |
|                                   | Street Furniture                                                                                                                                                                                                                                                                                                                                   |

| Street Lighting Maintenance Type    |                                                                                                  |
|-------------------------------------|--------------------------------------------------------------------------------------------------|
| <b>Corrective</b>                   | Lamp Repairs<br>Stock Repairs<br>Illuminated Sign Lamp Repairs<br>Illuminated Sign Stock Repairs |
| <b>Energy</b>                       | Street Lighting Energy Consumption<br>Illuminated Sign Energy Consumption                        |
| Structures Maintenance Type         |                                                                                                  |
| <b>Preventative</b>                 | Culverts & Retaining Walls – Strengthening Works                                                 |
| <b>Corrective</b>                   | Bridges - Structural Maintenance<br>Culverts & Retaining Walls – Repair Works                    |
| Traffic Management Maintenance Type |                                                                                                  |
| <b>Preventative</b>                 | Refurbishment of signalised junctions<br>Refurbishment of signalised crossings                   |
| <b>Corrective</b>                   | Routine and Reactive Repair                                                                      |

Maintenance is measured and monitored using service standards and performance indicators which are detailed in Appendix 3 - Service Standards & Performance Indicators.

#### Maintenance Backlog and Steady State

Maintenance backlog is a national, theoretical measure of the investment required to restore the asset to an as new condition.

Steady State is a national, theoretical measure of the invest required to maintain the asset in its current condition.

The Roads asset has a maintenance backlog of £139 million. Maintaining the asset with this significant backlog presents increased risk of disruption for communities and reactive revenue costs.

| Asset Type              | Backlog Figure 2023 | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                            | Steady State Figure 2023 |
|-------------------------|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| <b>Carriageways</b>     | £99,775,000         | The headline backlog calculated in the model is the cost of producing a network free from any 10m subsections in an amber or red condition. It is not, however, a network that is free of deterioration; deterioration will exist at levels just below the lower threshold values.<br><br>The steady state calculated by the model is the average annual budget, excluding any allowance for inflation, to maintain the same network RCI each year. | £17,222,000              |
| <b>Footways</b>         | N/A                 | Backlog and steady state are currently not calculated for the asset type.                                                                                                                                                                                                                                                                                                                                                                           | N/A                      |
| <b>Street Furniture</b> | N/A                 | Backlog and steady state are currently not calculated for the asset type.                                                                                                                                                                                                                                                                                                                                                                           | N/A                      |

|                           |             |                                                                                                                                                                                                                                                   |            |
|---------------------------|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| <b>Street Lighting</b>    | £0          | Due to the ongoing funded LED replacement programme this asset type has no backlog.                                                                                                                                                               | £743,349   |
| <b>Structures</b>         | £50,000,000 | This backlog figure is calculated using the Structures programme. Within the current backlog of road bridge & retaining wall related upgrades, replacements and repairs of £18.5m has been risk assessed as high priority requiring urgent works. | £1,580,000 |
| <b>Traffic Management</b> | £1,067,000  | This backlog figure is calculated based on number of sites and estimated costs for required works. This figure consists of 15 traffic signal sites that are out with their estimated service life.                                                | £385,000   |

## Cost of the Roads asset

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Detailed financial information relating to the costs of the roads is captured and updated within the Roads Asset Management System (WDM). Below is a summary of key information:

### The Investment Blueprint

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In 2021 Perth & Kinross Council approved the Investment Blueprint, which sets out the rationale and key drivers for change. It provides five overarching principles to inform decision-making and direct the investment of public money where it is most needed. The principles are, that our investment decisions must: -

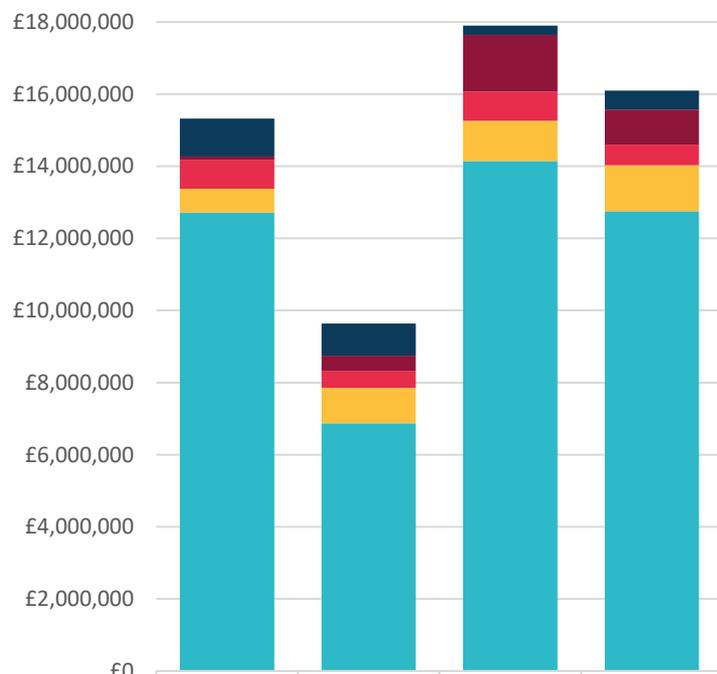
- mitigate against the impact of climate change
- promote inclusive economic growth and a vibrant community
- promote equality and
- support the delivery of sustainable public services through effective management of our assets
- promote and enhance digital inclusion

The Blueprint's function is to identify future investment priorities and to establish a more transparent and flexible approach to investment decision-making, ensuring that capital investment decisions support corporate objectives and priority outcomes.

## Capital

Roads capital expenditure is illustrated in the chart below, total capital expenditure for 2022/2023 was £16,097,784:

### Annual Roads Capital Investment



## 6-Year Funded Capital Programmes

These comprise both named projects and programmes of schemes of maintenance or improvement work derived from condition data and local knowledge:

| Asset Stream     | Programme Name                         | Purpose                                                                                                                                                            |
|------------------|----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Carriageways     | Structural Maintenance                 | Schemes identified and design programme established with competitive award split identified, works programmed for both internal and external contractors prepared. |
|                  | Structural Maintenance – Timber Routes | Match grant funding from Strategic Timber Transport Fund (STTF)                                                                                                    |
| Footways         | Structural Footways                    | Projects identified. Competitive split identified and works programmed for both internal and external contractors prepared                                         |
| Street Furniture | Safety Fencing                         | Installation of safety barriers alongside identified road/rail interfaces.                                                                                         |
| Street Lighting  | LED Conversion                         | This project will provide significant energy saving both in terms of cost and CO2 emissions.                                                                       |
| Structures       | Bridge Refurbishment Programme         | "Holding Account" budget heading. Monies to be transferred annually or more frequently as required to other budget headings as determined to meet Asset            |

|                                                                          |  |                                                                                                                                                                                                                                                                                          |
|--------------------------------------------------------------------------|--|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                          |  | Management needs as determined by risk assessment & asset management data.                                                                                                                                                                                                               |
| Bridge Refurbishment Programme – Inspections & Assessments               |  | Appointment of specialist external consultants to carry out bridge scour assessments, bridge & retaining wall load capacity assessments, bridge parapet upgrade assessments as required where in-house staff do not have the necessary capacity, qualifications, software or experience. |
| Bridge Inspection Programme – Capital Refurbishment                      |  | Monies to be transferred from Bridge Refurbishment Programme heading annually or more frequently as required to fund identified projects as determined by risk assessment & asset management data.                                                                                       |
| Vehicular Bridge Parapets Programme                                      |  | Assessment and Upgrading of Vehicle Parapets Programme.                                                                                                                                                                                                                                  |
| Bridge Refurbishment Programme – Dalhenzean Culvert Replacement          |  | Replace existing masonry arch culvert (A93/21 C05) with a reinforced box culvert.                                                                                                                                                                                                        |
| Bridge Refurbishment Programme - Dunkeld Golf Course Culvert Replacement |  | Replace existing masonry arch culvert (A93/21 C05)                                                                                                                                                                                                                                       |

|                                  |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|----------------------------------|--|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                  |  | with a reinforced box culvert.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Old Perth Bridge – Strengthening |  | Carry out works recommended by the 2018 Bridge Assessment study. Namely <ul style="list-style-type: none"> <li>• Initiate a regular regime of bridge inspections employing specialist access techniques to closely monitor cracking to the footway slabs, until such times as the slabs can be replaced;</li> <li>• Replace all cracked footway slabs, install strengthening plates and re-surface footway;</li> <li>• Carry out strengthening works to the masonry arch barrels &amp; piers;</li> <li>• Shot-blast, repair &amp; repaint all footway support metal work and parapets.</li> </ul> |
| Queen’s Bridge - Strengthening   |  | Carry out works recommended by the 2018 Bridge Assessment study. Namely: <ul style="list-style-type: none"> <li>• Investigate and strengthen East approach span as may be required;</li> <li>• Installation of new under-bridge drainage system to prevent the internal deck voids filling up during flood</li> </ul>                                                                                                                                                                                                                                                                             |

|                           |                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|---------------------------|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                           |                                    | <p>conditions;</p> <ul style="list-style-type: none"> <li>• Concrete repairs to all surfaces (piers &amp; main structure);</li> <li>• Infilling of scour area adjacent to East pier;</li> <li>• New footway service bay cover slabs to resist accidental wheel loads, strengthen supports to lighting columns, and resurface footways;</li> <li>• Waterproofing to main deck &amp; footway service bays;</li> <li>• Resurfacing of main carriageway and replacement of asphaltic bridge plug joint;</li> <li>• Works to protect the exposed deck tie-down bars.</li> </ul> |
|                           | Culteucher Culvert                 | Replace existing temporary steel bridge (on hire) with culvert.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|                           | Tullyfergus                        | Installation of scour protection to protect existing bridge abutments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|                           | Garry Viaduct                      | Replacement of Bearings and Parapets; including strengthening of deck for bearing replacement jacking up, and to cater for increased parapet vehicular deterrent capacity.                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Traffic Management</b> | Traffic Signals Renewals/Upgrading | Budget for traffic signal renewal programme.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

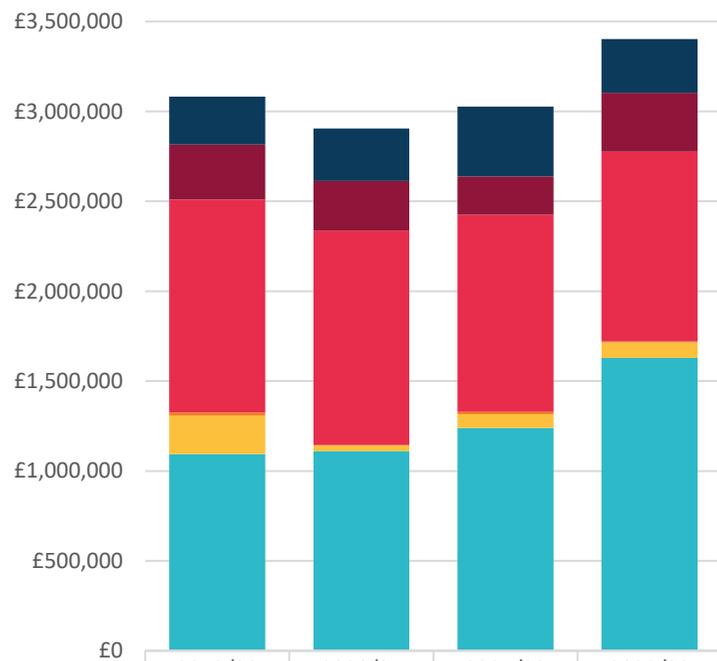
|  |                                  |                                                                                                                                                                                                                                                                                                                                                                                            |
|--|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | 20 mph signage Programme         | Provision of Vehicle Activated Signs (VAS) at various locations throughout Perth & Kinross. This includes the procurement of the signs, associated civil works, installation of VAS and provision of power to the signs.                                                                                                                                                                   |
|  | Road Safety Initiatives          | RSI Capital budget for a programme of works based on local community concerns, accident analysis and investigations.                                                                                                                                                                                                                                                                       |
|  | Cycling, Walking & Safer Streets | All projects identified and detailed in the May EI & ED Committee Report (Ref.23/103). This budget is to be used for the purpose of undertaking a programme of works for local cycling, walking and safer routes projects. A bid for additional match funding for some projects will be submitted to Tactran and Sustrans Community Links when the respective projects have been designed. |
|  | A977 Upgrades                    | This is a programme of works to provide mitigation                                                                                                                                                                                                                                                                                                                                         |

|  |                                      |                                                                                                                       |
|--|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
|  |                                      | measures to address local community concerns.                                                                         |
|  | Brioch Road Development              | Realignment of Brioch Road/King Street/Burrell Street junction.                                                       |
|  | School Road Safety Measures          | This is a programme of works to provide road safety measures in the vicinity of schools including 20mph speed limits. |
|  | Road Safety – Pedestrian Crossings   | Budget for Pedestrian Crossings programme.                                                                            |
|  | Road Safety – 20mph Measures Schools | This is a programme of works to provide road safety measures in the vicinity of schools.                              |

## Revenue

Roads revenue expenditure is illustrated in the chart below, total revenue expenditure for 2022/2023 was £3,402.955.

### Annual Roads Revenue Spend



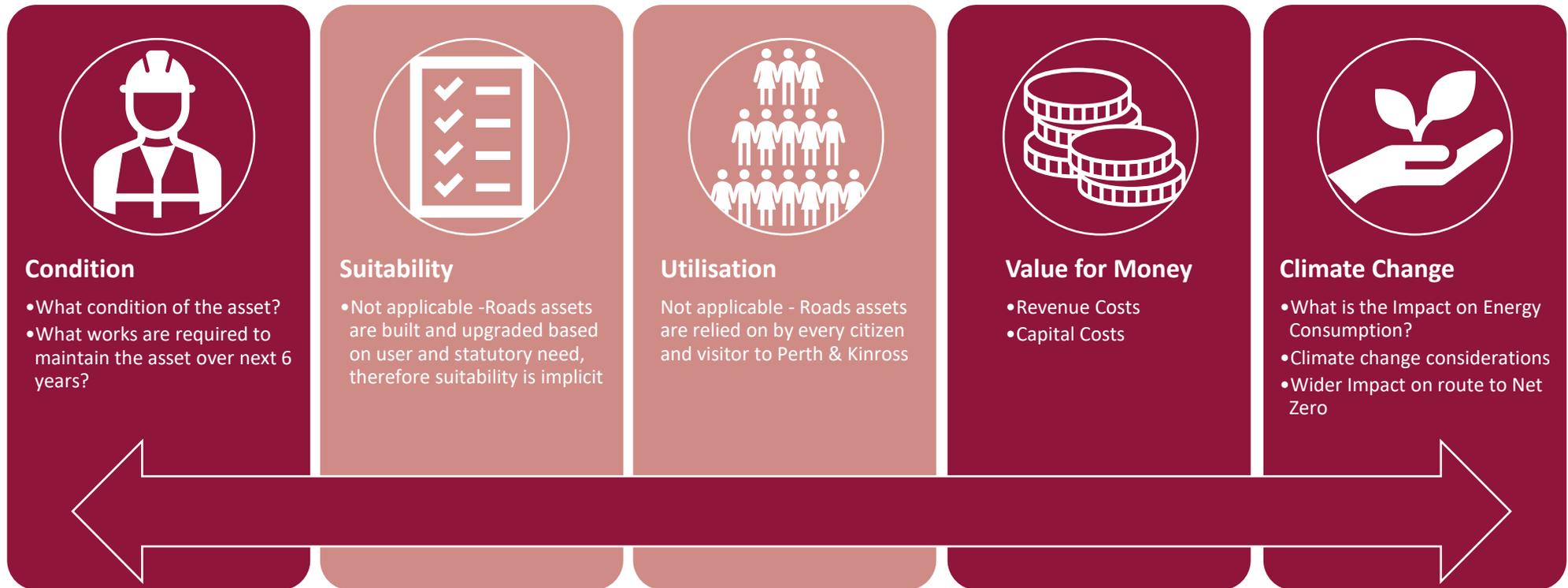
|                      | 2019/20    | 2020/21    | 2021/22    | 2022/23    |
|----------------------|------------|------------|------------|------------|
| ■ Traffic Management | £266,692   | £292,234   | £388,261   | £299,978   |
| ■ Structures         | £305,765   | £274,132   | £212,500   | £326,498   |
| ■ Street Lighting    | £1,184,138 | £1,195,177 | £1,096,908 | £1,056,172 |
| ■ Street Furniture   | £17,436    | £1,059     | £11,414    | £4,614     |
| ■ Footways           | £212,663   | £31,726    | £78,154    | £86,293    |
| ■ Carriageways       | £1,095,045 | £1,110,778 | £1,238,757 | £1,629,400 |

## How We Will Inform Investment - Asset Challenge

In line with our Corporate Asset Management Strategy, and related principles, we will ensure that investment within the Roads asset is effectively targeted via the undertaking of an assessment and challenge of all Roads assets:

- as a key part of annual benchmarking
- as a key part of the annual capital budget process
- as a key part of the annual revenue budget process

This process will be applied as outlined below:



Using the Asset Challenge Model

Any routine or projected works that require significant investment will prompt an **Asset Challenge** and be considered alongside other works programmes to allow for collaboration. Prior to progressing any investment requests, data will be collated and reviewed to ensure that the proposed course of action is the best method to meet the service need.

Ongoing monitoring and review of Roads assets will be completed to ensure that they meet agreed standards:

| <b>Asset Category</b> | <b>Asset Types</b>        | <b>Condition</b><br><br>Rating or Lifecycle (Years)                                                                                                                                                 | <b>Value for Money</b><br>                                                     | <b>Climate Change</b><br>                                                               |
|-----------------------|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Carriageways</b>   | A, B, C and U Class Roads | SMRCS survey results are used as a measure of condition<br><br>The data and results from these surveys are imported into WDM. Utilising a scoring matrix, which is created and agreed upon using algorithms, WDM generates rated schemes that form a comprehensive programme of works | Ensuring that the maintenance option chosen offers best value in terms of repair cost vs longevity<br><br>Ensuring joined-up working (cross-service and business) | Considering material types used. Recycling and re-using materials where possible<br><br>Promote the adoption of Procurement routes – local suppliers, low carbon materials |

|                       |                                 |                                                                                    |                                                                                                  |                                                                                    |
|-----------------------|---------------------------------|------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
|                       |                                 | Condition benchmarks or expected lifecycle are not relevant for Carriageway assets | Via SCOTS/APSE we compare our costs against family groups to ensure Best Value is being achieved | Considering length of diversion routes and impact on idling when programming works |
| Footways              | Footways                        | Footway condition rating is based on a SCOTS RAMP Footway Condition Assessment     |                                                                                                  |                                                                                    |
| Street Furniture      | Automatic Trash Screens         | 20 years                                                                           |                                                                                                  |                                                                                    |
|                       | Bollards (non-illuminated)      | 25 years                                                                           |                                                                                                  |                                                                                    |
|                       | Cattle grids                    | 25 years                                                                           |                                                                                                  |                                                                                    |
|                       | Gates                           | 20 years                                                                           |                                                                                                  |                                                                                    |
|                       | Grit Bins                       | 15 years                                                                           |                                                                                                  |                                                                                    |
|                       | Pedestrian barriers             | 25 years                                                                           |                                                                                                  |                                                                                    |
|                       | Safety Fences                   | 20 years                                                                           |                                                                                                  |                                                                                    |
|                       | Street name plates              | 20 years                                                                           |                                                                                                  |                                                                                    |
|                       | Traffic Signs (non-illuminated) | 20 years                                                                           |                                                                                                  |                                                                                    |
|                       | Verge marker posts              | 15 years                                                                           |                                                                                                  |                                                                                    |
| Watercourse Telemetry | 20 years                        |                                                                                    |                                                                                                  |                                                                                    |
| Weather Stations      | 20 years                        |                                                                                    |                                                                                                  |                                                                                    |

|                        |                               |                                                                                                   |  |  |
|------------------------|-------------------------------|---------------------------------------------------------------------------------------------------|--|--|
| <b>Street Lighting</b> | Columns Aluminium (post-2000) | 50 years                                                                                          |  |  |
|                        | Columns Aluminium (pre-2000)  | 40 years                                                                                          |  |  |
|                        | Columns Cast Iron             | 100 years                                                                                         |  |  |
|                        | Columns galvanised steel      | 30 years                                                                                          |  |  |
|                        | Columns non galvanised steel  | 25 years                                                                                          |  |  |
|                        | Control Cabinet               | 50 years                                                                                          |  |  |
|                        | Illuminated Bollards          | 20 years                                                                                          |  |  |
|                        | Illuminated Signs             | 20 years                                                                                          |  |  |
|                        | Lantern – Fluorescent         | 20 years                                                                                          |  |  |
|                        | Lantern - LED                 | 20 years                                                                                          |  |  |
|                        | Lantern – Metal Halide        | 20 years                                                                                          |  |  |
|                        | Lantern - SON                 | 20 years                                                                                          |  |  |
|                        | Lantern - SOX                 | 20 years                                                                                          |  |  |
|                        | Uplighters                    | 20 years                                                                                          |  |  |
|                        | Wall Bracket                  | 40 years                                                                                          |  |  |
| Wooden Pole            | 50 years                      |                                                                                                   |  |  |
| <b>Structures</b>      | Culverts                      | Condition is currently informed via General and Principal inspections, outputting the BSCI scores |  |  |
|                        | Footbridges                   |                                                                                                   |  |  |

|                           |                          |                                                                                                                                          |  |  |
|---------------------------|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------|--|--|
|                           | Retaining Walls          | The Structures Team is working towards implementing the UK Bridges Board's Structures Asset Valuation and Investment Tool (SAVI)         |  |  |
|                           | Road Bridges             |                                                                                                                                          |  |  |
|                           | Subways                  |                                                                                                                                          |  |  |
|                           | Unusual Structures       | Significant asset component data collection is required to enable this to provide dynamic condition data and inform a programme of works |  |  |
| <b>Traffic Management</b> | Junction Traffic Signals | 20 years                                                                                                                                 |  |  |
|                           | Pedestrian Crossings     | 20 years                                                                                                                                 |  |  |
|                           | Safety Cameras           | 15 years                                                                                                                                 |  |  |
|                           | Vehicle Activated Signs  | 10 years                                                                                                                                 |  |  |

## How We Will Inform Investment – Adherence to Strategic Principles

The following pages are grouped into the four strategic principles set out within the Roads Asset Management Strategy. They provide context and specific background information which has been used to create an action plan:

1. Work collaboratively to maximise shared opportunities
2. Utilise life-cycle management and proactively conduct preventative maintenance
3. To reduce our carbon footprint providing more sustainable procurement options whilst also improving infrastructure resilience and biodiversity
4. The Roads Asset operates in a safe manner

The document concludes with a Key Strategic Objectives Action Plan, which sets defines the key strategic objectives over the next 6 years.



## *Principle 1: Work collaboratively to maximise shared opportunities*

**Use the Officer Public Realm Group to ensure more effective collaboration across Services and Teams:** To ensure ongoing and effective collaboration this group will be formally re-established, with re-outlined scope and objectives. Representatives will be sought from all stakeholders to facilitate communication and coordination to identify common goals and projects between the differing departments. The group will foster knowledge-sharing and promote cross-training opportunities to promote cohesive and successful collaboration across PKC.

**The Traffic Management Team will continue to work with Elected Members and our communities to inform potential works:** We will continue to emphasise appropriate co-creation and prioritisation which considers local needs and provides regular updates. This ongoing engagement will promote strong partnerships and ensure that relevant programmed works align with community needs and priorities.

**In line with the Code of Practice we will discuss and agree with neighbouring Councils and Transport Scotland the alignment of intervention levels through Society Chief Officers Transportation in Scotland (SCOTS):** Utilising the existing SCOTS Groups we will work with neighbouring Councils to outline the creation of a service level/partnership agreement. This collaboration aims to align intervention levels for transportation projects across regions in Scotland, ensuring consistency, efficiency and compliance with standards while promoting knowledge sharing and consideration of regional priorities.

**Continue to work with the Tri-Council Roads Maintenance Strategy Group in collaboration with Dundee City Council, Angus Council & Tayside Contracts:** This group is part of the overarching Roads Maintenance Partnership (RMP) which has been in place since 1996. RMP will continue to participate in this group to facilitate Best Value and collaboratively approach roads maintenance.

**Street Lighting will continue to work in partnership with Tayside Contracts, Dundee City Council & Angus Council:** This partnership has been in place since 2006 and demonstrates best value and a collaborative approach to street lighting.

**Continue to work in partnership with Dundee City and Angus Council for the traffic signal maintenance contract.** This partnership demonstrates best value for the maintenance contract for traffic signals.

**Explore opportunities for collaborative working with external bodies e.g., Amey plc/BEAR Scotland/Transport Scotland:** We will actively approach collaboration with relevant external bodies to promote research, identify common objectives and discover areas where joint projects, shared resources and expertise could lead to mutual benefits and improve service delivery.

**Collaborate with developers/community groups to facilitate development:** We will work with Transport Planning and communities to ensure projects that impact the roads asset are aligned with corporate objectives and, where appropriate, future-proofed.

**Continue to seek efficiencies with other bodies – Roads Authority & Utilities Committee Scotland (RAUCS) Statutory utilities working in an area:** These are well-established, beneficial links and we will continue to actively employ these collaborative efforts to reduce public disruption by encouraging co-working on projects whenever feasible. By coordinating and synchronising activities, we aim to avoid the need for multiple closures of the same carriageway for parallel works, thereby minimising inconvenience to the public.

*Principle 2: Utilise life-cycle management and proactively conduct preventative maintenance.*

**Continue to review our asset data quality and where required update to meet current needs:** Data collection and management requires continuous updating and ongoing review and improvement of asset data. Accurate and dynamic data is essential to guide effective decision-making and resource allocation. The maturity of our asset data will be recorded and monitored using national guidelines.

**Ensure that maintenance and management arrangements for all additions to the Roads asset base are clearly identified as per the approved governance arrangements within the Strategic Investment Planning Framework:** The asset recording process will be reviewed to ensure that all assets, and their install dates, are captured within the Roads asset system (WDM) alongside details of maintenance responsibility. A handover process will be created to enable smooth handover between the team responsible for installation and the team responsible for maintenance. Where assets are being adopted their details will be captured and communicated via WDM, following the same process as all other assets. Where there is a need to hold data of non-PKC assets, ie where bridges on the road network are owned privately, their details will be captured and held alongside any legal information and related inspection information.

**Continue to work with software suppliers and internal colleagues to develop life cycle modelling tools:** The focus within the span of this plan will be to collect and record the internal structural data require to populate and utilise the Structures SAVI toolkit. The adoption and use of this tool will optimise resource allocation and achieve better long-term asset sustainability by enabling proactive in place of reactive maintenance.

**Prioritised matrices will be established for developing evidence-based programmes for Traffic Signals works:** By utilising existing asset data, risk assessments and seeking stakeholder input Traffic Management will develop prioritised matrices. These will be utilised to enable the development of evidence-based programmes for traffic signal works, ensuring that the most critical works are addressed first.

**Utilise the asset challenge process to assist in the development of programmes of work:** Where appropriate, we will incorporate the asset challenge process when determining programmes of work.

**Incorporate our programmes of work into the 6-year funded programme and 30-year Investment Plan:** To ensure a long-term and sustainable approach to the management of our Roads asset, we will integrate our programmes of work into the overall strategic investment planning process.

*Principle 3: To reduce our carbon footprint providing more sustainable procurement options whilst also improving infrastructure resilience and biodiversity.*

**Seek guidance from the Climate Change Action Group on establishing consistent benchmarking criteria, and climate change mitigating actions:** This will involve conducting environmental assessments, promoting sustainable practices, incorporating climate resilience measures and using green materials and suppliers with green credentials. Also, engaging stakeholders, monitoring performance and fostering continuous improvement will be essential for creating and maintaining an environmentally responsible road infrastructure. Roads will work with the Climate Change Action Group and the Perth and Kinross Climate Change Commission to outline and promote best practice.

**Work with the Association for Public Service Excellence (APSE) to establish carbon neutrality performance indicators:** The Association for Public Service Excellence (APSE) is a collaborative network that supports local authorities in enhancing their frontline services. With over 250 member councils across the UK, APSE provides expert advice, information, and expertise on various public services.

PKC will continue to participate in the APSE Performance Benchmarking Group to develop carbon neutrality performance indicators.

**Consider the long-term environmental impacts of roads asset management decisions:** The construction of roads asset, and the materials and vehicles involved, have an inter-related carbon impact, therefore it is important to ensure that this is considered within our decision-making process. Continued proactive maintenance will reduce the need for extensive repairs or replacements thus reducing the requirement for larger, more disruptive, carbon-heavy processes. This approach seeks to minimise environmental impact and promote the longevity and efficiency of roads infrastructure while preserving the environment.

**Incorporate Carbon Management scorings and weighting as part of our tenders, in liaison with Procurement Team:** Where appropriate, using PAS:2080 as guidance we will work with Procurement to develop tenders.

**Where possible to continue to recycle and re-use waste road layers:** In 2022/23 41,511 tonnes of bituminous waste was transferred for recycling with 4291 tonnes going to landfill which is a decrease of 4% of road materials going to landfill from 2021/22.

**Continue to seek recommendations and share ideas, discuss future solutions and partnership working regarding material de-carbonisation:** Collaborating with other organisations allows us to stay abreast of innovations, guidelines, regulations and ensures we are aware of any financial or other assistance.

Via active participations in discussions, research, and initiatives we can evaluate emerging technologies and materials that have the potential to reduce carbon emissions and enhance the sustainability of our Roads operations. This ongoing collaborative approach enables us to make informed decisions regarding the adoption of new options, as they become viable and commercially feasible.

**Review and refresh relevant asset inspections and assessments to take cognisance of climate related degradation to assets, including bridge scour and road embankment collapse risk:** As more frequent weather events are impacting the condition of the asset, the review and refresh of our asset inspections and assessments to consider climate-related degradation is essential for ensuring the resilience and safety of our Roads infrastructure. This proactive approach involves integrating climate change factors into our inspection and risk assessments and adopting adaptive strategies to manage works generated from these reviews.

**Principle 4: The Roads Infrastructure will be safe and fit for purpose**

**Continue to review and update inspection manuals and guidance to identify and assess hazards on the Roads asset:** Reviewing and updating inspection manuals and guidance is required to effectively identify and assess hazards. The national, risk-based approach to inspections guides consistent implementation of updated inspection procedures. This proactive approach, and ongoing review and update of inspection manuals, contributes to improved road safety and effective management of road assets.

**Continue to undertake and record Roads Asset inspections in accordance with the approved regime:** Standardised inspections, recorded and managed within WDM, enable the identification of defects and facilitates timely interventions. Officers will continue to undertake Roads Asset inspections in line with our approved regime, updating WDM as required.

The Structures team will establish procedures to ensure that all Structural Inspection Reports undergo review and authorisation by a Chartered Engineer, demonstrating a commitment to safety, quality, compliance and professional accountability.

**Working with partners to identify opportunities to fill skills gaps and meet requirements of relevant Codes of Practice:** Through targeted training, professional development/certifications and succession planning, PKC can ensure our workforce has the relevant industry standard skills. We will continue to share best practice, evaluate initiatives and promote internal skill development.

The Structures team have undertaken a gap analysis of the relevant technical codes of practice and will implement the key actions to ensure compliance with these.

**Continue to invoke effective contingency plans to deal with extreme weather events:** More frequent weather events are impacting on the Roads asset and resulting in Officers having to be more prepared to deal with emergency closures and diversions. PKC's ongoing readiness for these events involves conducting risk assessments, developing comprehensive plans and establishing clear communication protocols. Flexibility, public awareness and early warning systems contribute to swift and co-ordinated responses.

The Structures Team will create a procedure for inspections of critical structures that have been affected during weather events.

**Explore opportunities to employ developing technology in the review and management of our assets:** Developing technologies in asset management may provide opportunities to enhance efficiency and effectiveness. Officers will continue to actively participate in relevant groups and organisations to gather insights and share best practices. By actively participating in relevant groups and consistently providing and receiving feedback, officers ensure that they are equipped to address the evolving challenges and demands in their respective fields.

## Appendix 3 - Service Standards

| Asset Stream    | Measured By                                                                                                                  | Target Compliance |
|-----------------|------------------------------------------------------------------------------------------------------------------------------|-------------------|
| Carriageways    | Percentage of carriageway safety inspections completed on time                                                               | 100%              |
|                 | Percentage of carriageway Category 1 (Reactive) defects made safe within response times                                      | 100%              |
| Footways        | Percentage of footway safety inspections completed on time                                                                   | 100%              |
|                 | Percentage of footway Category 1 (Reactive) defects made safe within response times                                          | 100%              |
| Street Lighting | Electrical testing of all equipment shall be undertaken at a frequency of 6 years                                            | 100%              |
|                 | Emergency faults shall be made safe or repaired within 4 hours of notification                                               | 100%              |
|                 | The percentage of street light columns exceeding their expected service life (ESL) should be no more than 25%                | 25%               |
|                 | A non-emergency fault shall be rectified within 7 working days (Single Outage)                                               | 100%              |
|                 | Average time taken to repair faults to restore lamps to working order                                                        | 2.6 Days          |
| Structures      | Carry out General Inspections at a maximum frequency of 2 years. Excluding structures programmed for a Principal Inspection. | 2 years           |
|                 | Carry out Principal Inspections at a maximum frequency of 6 years, including specialist access inspections                   | 6 years           |
|                 | Attend emergency maintenance call outs within 1 day.                                                                         | 100%              |

|                    |                                                                                                         |      |
|--------------------|---------------------------------------------------------------------------------------------------------|------|
|                    | Attend non-emergency maintenance call outs within 7 days                                                | 100% |
| Traffic Management | Attendance at Major faults shall be within 4 hours                                                      | 100% |
|                    | Attendance at Minor faults shall be within 24 hours                                                     | 100% |
|                    | Undertake electrical inspections for electrical assets at each installation every year                  | 100% |
|                    | Initial repair of major faults shall be within 1 hour                                                   | 100% |
|                    | Initial repair of minor faults shall be within 24 hours                                                 | 100% |
|                    | The percentage of traffic signal installations exceeding their ESL of 20 years should be no more than 0 | 100% |

## Performance Indicators

| Asset Stream    | Description                                                                             |
|-----------------|-----------------------------------------------------------------------------------------|
| Carriageways    | Percentage of carriageway Category 1 (Reactive) defects made safe within response times |
|                 | Percentage of carriageway safety inspections completed on time                          |
|                 | Percentage of carriageway length to be considered for maintenance treatment             |
|                 | Percentage of carriageway length treated                                                |
|                 | Total carriageway maintenance expenditure by carriageway length per km                  |
|                 | Percentage of material disposed at landfill (%age of overall excavations)               |
|                 | Bituminous arisings (tonne) transferred for recycling                                   |
| Footways        | Percentage of footway Category 1 (Reactive) defects made safe within response times     |
|                 | Percentage of footway safety inspections completed on time                              |
|                 | Percentage of footway length treated                                                    |
| Street Lighting | Percentage of repairs within 7 days                                                     |
|                 | Average cost for repairing a routine fault                                              |
|                 | Average time taken to repair (days)                                                     |
|                 | Public calls as a percentage of street lights                                           |
| Structures      | Percentage of principal inspections carried out on time                                 |
|                 | Percentage of general inspections carried out on time                                   |

|                    |                                                   |
|--------------------|---------------------------------------------------|
| Traffic Management | Percentage of faults rectified within target time |
|                    | Percentage of faults rectified on first visit     |



**PERTH & KINROSS COUNCIL****ELECTED MEMBER STRATEGIC INVESTMENT ADVISORY GROUP****TERMS OF REFERENCE****Purpose**

To provide political and strategic direction and oversight of the Council's investment planning requirements and to inform the 30 year investment plan in line with the Council's vision, strategies, policies and plans.

**Scope**

- Initially to set and thereafter review the Council's asset requirements and associated investment planning.
- To work on an ongoing basis to provide information and support to the annual revenue and capital budget setting process for all political parties.
- To consider the strategic financial planning options and actions required to deliver a viable, sustainable and affordable investment plan over the short, medium and long term.
- To consider the impact of changing legislation, national policy making and emerging issues, developments and opportunities (eg Artificial Intelligence, Climate, Economy/Trade etc) on the Council's strategic investment planning, including investment in:
  - Property, including corporate, learning, health and social care, leisure and cultural estate
  - Social and Affordable Housing
  - Roads and infrastructure
  - Greenspace
  - ICT infrastructure
  - Fleet
- To consider any required changes to policy and/or levels of service as a result of enhanced or reduced levels of investment for particular asset types.
- To consider the investment requirements alongside other public sector delivery partners
- To provide Elected Member scrutiny and oversight of the ongoing delivery of the 30 year investment plan, benefits and outcomes.

**Membership and operation**

The group will consist of 1 representative from each political grouping within the Council and will be chaired by the Council Leader.

The group will be supported by a core team of Council officers consisting of;

- The Executive Team
- Strategic Lead - Finance and Business Support/ Section 95 Officer
- Strategic Leads for asset portfolios (Property, Fleet, Roads, Greenspace, Digital and Housing)
- Strategic Lead – Legal and Governance
- Service Manager – Capital Investment and Asset Management

Other officers will support and attend the group as required for specific agenda items.

Officers will provide papers to the group for its consideration and feedback. Any matters which subsequently have an asset investment, financial or policy implication will be remitted to the relevant committee for consideration. Under the current committee structures this would be the Council's Property Sub Committee, Finance and Resources Committee or Council.

### **Frequency of Meetings**

Meetings will be held every two months and more frequently as required to contribute to the annual revenue and capital budget setting process, medium term financial planning updates and any additional Special Council meetings relating to investment planning decisions.

## Perth And Kinross Council

22 January 2023

### TRANSFORMATION REVIEW OF LEISURE ASSETS

#### Report by Head of Culture & Communities Services

(Report No. 24/19)

## 1. PURPOSE

- 1.1 A Transformation Review of leisure assets owned or funded by the Council has been carried out, as instructed by Council in March 2023. This report summarises Review findings and makes 10 recommendations to maintain accessible, affordable and sustainable leisure provision for our communities over the next 5-10 years.

## 2. RECOMMENDATIONS

- 2.1 It is recommended that Council:
- notes the Review findings set out in section 6.
  - approves the recommendations set out in section 7.
  - instructs officers to bring forward a detailed implementation programme for approval to Council by mid-2024.

## 3. STRUCTURE OF REPORT

- 3.1 This report is structured over the following sections:
- Section 4: Background, scope and drivers for the Review
  - Section 5: Review scope and methodology
  - Section 7: Recommendations:
  - Section 8: Next steps
  - Section 9: Conclusion

## 4. BACKGROUND

### Review background, scope & drivers

- 4.1 In March 2023 Council instructed officers to conduct a review of all current leisure assets owned by us or our arms-length delivery partner Live Active Leisure (LAL). The purpose of the Review is to **review current leisure facilities operated by Live Active Leisure to ensure they align with future service needs and make best use of resources**. The Review Team comprised senior officers from PKC Property and Communities Services and LAL. Integratis Consulting and EKOS were commissioned to provide independent analysis of data and evidence relating to facilities, including energy efficiency considerations. The Review Team met from June-November 2023.

- 4.2 The following facilities were looked at as part of the Review:
- Stand-alone leisure facilities in Perth, Blairgowrie, Pitlochry and Kinross.
  - Leisure facilities on Community Campuses
  - Leisure facilities at/adjacent to secondary schools but not on Community Campus sites
  - Community Halls also operated by LAL and from which community fitness classes are often delivered.
- 4.3 LAL receives an annual contract fee of £3.993M (2023/24) to operate these facilities and wider sport and physical activities, of which £418,000 is for operating Community Campus facilities. There is non-recurring funding in the 2023/24 contract enabling LAL to continue operating the Atholl Centre and Community Halls until 31 March 2024. This report makes recommendations to support Community Asset Transfer of Halls and planning work is underway to co-locate culture and leisure services in Pitlochry. £1,089,600 of the contract fee is spent on LAL's corporate overheads (including staffing and property/utility costs). In addition it receives ring-fenced funding from **sports**scotland/the Council to deliver Active Schools and Community Sports Hub programme.
- 4.4 Blairgowrie Recreation Centre is currently undergoing a £35M redevelopment to Passivehaus standards. Plans are underway to create co-located leisure and wider community facilities at Pitlochry, replacing the current LAL Atholl Centre which needs renewal.
- 4.5 Leisure facilities in adjacent local authority areas (Tayside, Stirling) or offered by other providers in Perth and Kinross were not analysed in detail for this Review. However it is important to note that Perth and Kinross residents can, and do, use these facilities which may be more suitable for their needs depending on various factors.
- 4.6 Grass pitches and wider greenspaces were not looked at within the Review.

### **Review drivers**

- 4.7 The operating environment for publicly funded leisure services is tough. Low cost and online providers, changing customer needs and very high levels of capital investment required for venues to remain attractive and competitive and safe are all factors, alongside diminishing external funding for facilities renewal or replacement.
- 4.8 Alongside these factors we face particular property cost challenges in Perth:
- The Perth leisure offer is currently split across 3 sites. The buildings are costly to run, and their design makes them difficult to adapt to new market opportunities and customer needs.
  - The buildings are all 30+ years old with more frequent unplanned closures which erode income and customer confidence.

- The buildings generate significant carbon emissions. Wetside facilities (pools, ice) are inherently high consumers of energy, but the age of the buildings makes this more difficult and costly to address.

### **Other key factors**

- 4.9 In February 2021 the Council approved an outline business case for the PH20 project, a redevelopment/new build on the current Perth Leisure Pool/Dewars Centre sites with an indicative capital cost of £90M. In the following 12 months construction inflation and public borrowing costs rose, alongside continued uncertainty about returning customers to LAL facilities post-Covid. These factors and the increased level of public subsidy required both to operate PH20 and service loan charges raised significant affordability and value for money risks. Accordingly the Council decided to pause the project in March 2023 pending the outcome of this Review.
- 4.10 In August 2022 Historic Environment Scotland received a proposal from the Twentieth Century Society to designate Bell's Sports Centre and Perth Leisure Pool as Category B listed buildings. A public consultation on these proposals is currently ongoing and will close in late January 2024. If listed status is granted it will entail significant additional responsibilities for LAL as the current owner of both buildings. Listed status does not however preclude other options for future use, including commercial marketing and disposal by LAL.
- 4.11 There are interdependencies between this Review and:
- The Corporate Asset Management Plan (Report 24/18 refers)
  - The Transformation Review of ALEOs approved by Council 6 December 2023 ( [Report 23/347](#) refers)

## **5. REVIEW FINDINGS**

5.1 This section of the report sets out key findings on:

- Current and future usage trends for key leisure activities
- Accessibility of leisure facilities for the population of Perth and Kinross
- Cost and usage analysis for key facilities
- Energy efficiency considerations
- Perth leisure provision: key issues

### **Overview of current and likely future usage**

5.2 The Review looked at key usage trends in the last 3 years across all facilities in scope of the Review. Table 1 summarises this and shows the size of user groups for each activity in all LAL venues plus the Community Campuses. 2021/22 figures are excluded as they showed significant impact of Covid restrictions.

**Table 1: Key usage trends**

| Activity                              | 2019/20 | 2021/22 | 2022/23 | Future forecast demand <sup>1</sup> |
|---------------------------------------|---------|---------|---------|-------------------------------------|
| Swimming Usage                        | 274,098 | 147,971 | 314,246 | ↓                                   |
| Swimming Lessons                      | 61,764  | 50,601  | 80,297  | ↑                                   |
| Gym Usage                             | 137,189 | 63,261  | 117,800 | ↑                                   |
| Fitness Class Usage                   | 139,347 | 44,262  | 72,246  | ↑                                   |
| Sports Hall Usage (excluding curling) | 68,561  | 27,663  | 40,300  | →                                   |
| Racquet sports (all)                  | 19,078  | 9,644   | 15,040  | →                                   |
| Gymnastics                            | 20,480  | 12,301  | 12,060  | →                                   |
| Curling                               | 14,266  | 10,030  | 10,977  | ↓                                   |
| Ice skating                           | 5,488   | 4,557   | 5,786   | →                                   |
| Indoor bowling                        | 6,065   | 2,723   | 5,579   | ↓                                   |

5.3 Future forecast demand is based on wider trend analysis including national trends, so may not reflect actual usage of LAL venues in 2019/20 and 2022/23. 2022/23 figures still show impact of post-Covid recovery although (for example) demand for gym, fitness classes and gymnastics is now recovering strongly.

5.4 Table 1 shows:

- Swimming is the leisure activity in which most people participate, particularly programmed swimming lessons/activities. Although swimming usage shows an overall increase, the wider national trend shows a decline in leisure swimming but growth in swimming lessons. The temporary closure of Olympia Dundee has driven a temporary increase of leisure swimming in Perth.
- Gym and group fitness are the second most used leisure activities, in line with national trends and despite increased local private sector competition in Perth.

- Sports halls are key assets for local voluntary sports clubs, accounting for 6% of total usage (excluding curling).

### Accessibility of leisure facilities

5.5 The Review looked at how accessible leisure facilities are via a 20-minute journey by either car or public transport. Table 2 summarises this for the population as a whole and **Appendix 1** breaks this data down by locality.

**Table 2: accessibility to leisure facilities by car or public transport**

| Travel time | Travel mode                                                                       | Swimming Pool | Sports hall | Fitness Gym | Group Fitness |
|-------------|-----------------------------------------------------------------------------------|---------------|-------------|-------------|---------------|
| 20 Minutes  |  | 70%           | 84%         | 82%         | 82%           |
| 20 Minutes  |  | 28%           | 39%         | 34%         | 34%           |

- 5.6 Given our large and predominantly rural geography, 20 minutes travel time or less will never be achievable/affordable for all localities, notwithstanding the fact the Council is making or considering substantial investment in facilities in Eastern and Highland Perthshire. However Table 2 shows that, overall, accessibility to leisure facilities across Perth and Kinros is reasonably good.
- 5.7 Community Halls are key assets for leisure in rural communities where they are often used for community fitness classes operated by individual instructors. A Community Asset Transfer programme is in place for community halls operated by LAL but requires further investment to support and incentivise local community groups to take on management of these buildings where possible.
- 5.8 Total school use in 2022/23 was only a small proportion of total LAL usage (around 35,000 usages across all LAL facilities). There are known factors (transport, timetable constraints etc) which explain this, but the key point is that LAL facilities, including those on Campuses, are most used by wider communities.
- 5.9 Wider community use of leisure facilities on secondary school sites apart from the Campuses was also analysed. There are some caveats to the data due to variations in how schools record usage, but overall usage of school facilities by the wider community is minimal compared to other LAL venues. Football was the most popular activity. This may be because school facilities are less easy for communities to book and use.

## Running costs, capital investment and usage analysis

5.10 The Review looked at the current operating costs of each venue. **Table 3** sets this out, alongside usage cost per head, and estimated capital investment required over the next 5 years to maintain and repair each venue based on recent condition surveys. Investment needs for schools with major sports facilities are included for completeness/to show the overall future investment requirements for the Council, although as stated wider community use of these facilities is minimal.

**Table 3: Usage, net operating loss/surplus, cost per head and capital spend requirements by venue.**

| Venue                            | Usage 2022/23    | Income 2022/23    | Operating loss/surplus 2022/23 | LAL Overheads 2022/23 | Subsidy Per Head | Capital (5 Yrs)    |
|----------------------------------|------------------|-------------------|--------------------------------|-----------------------|------------------|--------------------|
| Perth Leisure Pool               | 354,546          | £1,658,945        | *£769,927                      | £363,374              | £2.17            | £873,460           |
| Bell's Sports Centre             | 261,924          | £793,934          | *£570,856                      | £218,326              | £2.17            | £1,131,085         |
| Live Active Loch Leven           | 64,304           | £323,394          | *£372,361                      | £99,635               | £5.79            | £682,899           |
| Dewars Centre                    | 40,813           | £246,282          | *£346,670                      | £62,478               | £8.49            | £1,868,837         |
| Strathearn Community Campus      | 100,123          | £313,557          | *£244,782                      | £82,053               | £2.44            | £766,514           |
| Live Active Atholl               | 8,185            | £33,783           | *£92,799                       | £23,444               | £11.33           | £431,685           |
| Live Active Blairgowrie          | 56,076           | £249,763          | *£198,352                      | £87,914               | £3.53            | n/a                |
| Breadalbane Community Campus     | 34,423           | £156,467          | *£110,388                      | £52,748               | £3.20            | n/a                |
| Loch Leven Community Campus      | 41,232           | £77,028           | *£9,741                        | £35,165               | £0.23            | n/a                |
| Blairgowrie Community Campus     | 4,178            | £39,236           | *£9,392                        | £5,862                | £2.24            | n/a                |
| Glenearn Community Campus        | 1,783            | £3,168            | *£2,686                        | £0                    | £1.50            | n/a                |
| North Inch Community Campus      | 36,440           | £79,581           | *£8,399                        | £35,165               | ***£0.23         | n/a                |
| <b>Total (LAL Venues)</b>        | <b>1,004,027</b> | <b>£3,975,138</b> | <b>£2,719,555</b>              | <b>£1,066,164</b>     |                  |                    |
| Aytoun Hall                      | 13,706           | £23,495           | £69,332                        |                       | £5.06            | £78,510            |
| Moncrieffe Community Centre      | 2,732            | £3,856            | £16,835                        |                       | £6.16            | Not available      |
| Scone Community Hall             | 2,842            | £4,173            | £15,837                        |                       | £5.57            | £486,154           |
| Dunning Town Hall                | 3,231            | £2,838            | £14,453                        |                       | £4.47            | £176,803           |
| Blackford Community Hall         | 2,641            | £3,066            | £12,372                        |                       | £4.68            | £5,712             |
| Tulloch Community Hall           | 7,618            | £6,509            | £6,477                         |                       | £0.85            | £193,145           |
| Pitlochry Town Hall              | 8,162            | £24,373           | £5,881                         |                       | £0.72            | £202,772           |
| <b>Total (Halls)</b>             | <b>40,932</b>    | <b>£68,310</b>    | <b>£141,187</b>                | <b>£23,444</b>        | <b>£3.45</b>     |                    |
| Perth Grammar                    | 1,562            | £1,668            | **£583                         |                       | £0.37            | £15,474,970****    |
| Perth High Games                 | 5,533            | £11,073           | **£1,605                       |                       | £0.29            | £2,563             |
| Perth Academy                    | 4,385            | £12,848           | **£8,164                       |                       | £1.86            | £14,308,707****    |
| Bertha Park High                 | 13,879           | £35,328           | **£28,776                      |                       | £2.07            | n/a                |
| <b>Total (Secondary Schools)</b> | <b>25,359</b>    | <b>£60,917</b>    | <b>**£39,128</b>               |                       |                  | <b>£29,786,240</b> |
| <b>Grand Total</b>               | <b>1,070,228</b> | <b>£4,104,365</b> | <b>£2,838,412</b>              | <b>£1,089,608</b>     |                  |                    |

\*Include LAL overhead charges, LAL provides full property management services which are reflected in the subsidy per head. These costs are not reflected in the Community Campus subsidy per head. \*\* Includes an apportionment of school operating costs, Red denotes Loss, Black denotes surplus, n/a denotes not applicable as maintenance incl in annual unitary charge. \*\*\*Denotes operating surplus per head. \*\*\*\* whole school costs

## Capital investment requirements by facility.

5.11 Table 4 below shows the capital spend required for LAL venues including Halls in more detail over the next 5 years. (The Campus facilities including Breadalbane Pool are excluded as these are maintained within the Investment in Learning programme. Secondary schools are also excluded as investment needs are considered within the school estate programme.) This information is based on most recent building condition surveys. It excludes capital spend to improve energy efficiency of buildings, which is considered in the next section of this report.

**Table 4: Estimated capital expenditure required by venue (base date 2023)**

| Venue                       | *Urgent         | yr1               | yr2               | yr3             | yr4             | yr5             | Total                |
|-----------------------------|-----------------|-------------------|-------------------|-----------------|-----------------|-----------------|----------------------|
| Bell's Sports Centre        | £245,622        | £390,524          | £119,812          | £125,730        | £105,629        | £143,768        | <b>£1,131,085</b>    |
| Dewars Centre               | £188,066        | £823,779          | £413,108          | £318,629        | £65,142         | £60,113         | <b>£1,868,837</b>    |
| Live Active Atholl          |                 |                   | £431,685          |                 |                 |                 | <b>£431,685</b>      |
| Live Active Loch Leven      | £12,397         | £112,028          | £191,527          | £182,213        | £5,377          | £179,357        | <b>£682,899</b>      |
| Live Active Strathearn      | £11,920         | £301,891          | £50,946           | £265,637        | £41,821         | £94,299         | <b>£766,514</b>      |
| Perth Leisure Pool          | £148,540        | £431,947          | £223,404          | £40,018         | £5,553          | £23,998         | <b>£873,460</b>      |
| <b>Total LAL Venues</b>     | <b>£606,545</b> | <b>£2,060,169</b> | <b>£1,430,482</b> | <b>£932,227</b> | <b>£223,522</b> | <b>£501,535</b> | <b>£5,754,480</b>    |
| Aytoun Hall                 |                 |                   | £42,711           | £126            | £34,729         | £944            | <b>£78,510</b>       |
| Moncreiffe Community Centre |                 |                   |                   |                 |                 |                 | <b>Not available</b> |
| Scone Community Hall        |                 | £110,494          | £375,660          |                 |                 |                 | <b>£486,154</b>      |
| Dunning Town Hall           |                 |                   | £157,567          |                 | £19,236         |                 | <b>£176,803</b>      |
| Blackford Community Hall    |                 | £5,712            |                   |                 |                 |                 | <b>£5,712</b>        |
| Tulloch Community Hall      |                 | £158,044          | £21,666           | £13,435         |                 |                 | <b>£193,145</b>      |
| Pitlochry Town Hall         |                 |                   | £192,917          |                 |                 |                 | <b>£192,917</b>      |
| <b>Total Halls</b>          |                 | <b>£274,250</b>   | <b>£790,521</b>   | <b>£13,561</b>  | <b>£53,965</b>  | <b>£944</b>     | <b>£1,133,241</b>    |
| <b>Grand Total</b>          | <b>£606,545</b> | <b>£2,334,419</b> | <b>£2,221,003</b> | <b>£945,788</b> | <b>£277,487</b> | <b>£944</b>     | <b>£6,386,186</b>    |

\*Urgent denotes within 1 Year

## Energy efficiency

5.12 The six key LAL venues are some of the most energy intensive buildings in Perth and Kinross, especially the swimming pools. A building performance report has been prepared for these buildings to inform the Review recommendations. There are measures which can be taken to reduce energy consumption, aligned with the Council's Climate Change Action Plan and statutory obligations to implement a Local Heat and Energy Efficiency Strategy (LHEES) in order to meet national carbon reduction targets. Ideally, these measures should be carried out at the same time as wider building condition issues to reduce closure periods.

**Table 5: Current energy consumption & estimate costs of energy efficiency measures.**

| Asset                  | Current Energy Use Intensity (EUI) in kWh/m2 | Capital Investment 2025 – 2030** | Current Baseline Annual Energy Costs | Proposed Annual Energy Costs, Post Investment (2030)*** | Estimated Percentage Cost Reduction |
|------------------------|----------------------------------------------|----------------------------------|--------------------------------------|---------------------------------------------------------|-------------------------------------|
| Perth Leisure Pool     | 1,361                                        | £3,750,000                       | £566,869                             | £285,000                                                | ~50%                                |
| Dewars Centre          | 323                                          | £4,500,000                       | £206,942                             | £157,000                                                | ~25%                                |
| Live Active Strathearn |                                              | £1,100,000                       | £123,138                             | £75,000                                                 | ~40%                                |
| Live Active Loch Leven | 1168                                         | £1,100,000                       | £146,493                             | £86,000                                                 | ~40%                                |
| Bells Sports centre    | 234                                          | £4,200,000                       | £195,945                             | £170,000                                                | ~15%                                |
| Live Active Atholl     | 118                                          | £455,000                         | £22,725                              | £19,000                                                 | ~15%                                |
| <b>Total</b>           |                                              | <b>£15,105,000</b>               | <b>£1,262,112</b>                    | <b>£792,000</b>                                         |                                     |

5.13 **Table 5** shows the current energy consumption of each building and estimated cost of energy efficiency improvements. It excludes leisure facilities at Strathearn which are owned by LAL and Campus facilities, again because these are maintained within the Investment in Learning contract. Measures which can be taken include:

- Upgrade and improve Building Management systems and associated software (BMS)
- Upgrade lighting to controllable LED lighting
- Replace obsolete and inefficient heating & ventilation equipment.
- Improve insulation where appropriate
- Introduce ‘demand response’ measures such as reducing space heating temperatures by 1-2 °C, reducing hot water storage capacity and switching off equipment when not in use.

#### **Perth city leisure provision: key issues**

5.14 The three major LAL venues in Perth (PLP, Bell’s, Dewar’s) account for over **60%** of total usage and **60%** of total annual Council subsidy for leisure - **£2.7M** from the total LAL contract fee of £3.933M. Over the next 5 years they will require a minimum of **£3.9M** capital spend on repairs and maintenance, whilst operating costs will continue to rise, and usage of some leisure activities continues to fall. This capital spend excludes the estimated £1.5-2M required to reinstate Bell’s following the most recent flood damage in October 2023.

5.15 A scenario in which PLP and Bell’s become Category B listed buildings, as indicated in para **4.10**, will increase the maintenance obligations on LAL whilst potentially impacting on the nature and cost of any future modifications to the buildings, including energy efficiency measures.

5.16 Energy efficiency measures for the 3 buildings are estimated to cost **£12.4M**. Whilst wetside leisure facilities (pools and ice) are particularly limited in terms

of energy efficiency, because these are aging buildings there is a limit to how cost effective these measures will be.

- 5.17 Bell's is currently out of use following recent flood damage. In 2022 LAL repurposed Bell's Coaching Hall into gym and group fitness provision which now accounts for around 100,000 usages pa and around 50% of income at Bell's. However Bell's income is still heavily reliant on declining activities in the main Arena, including national events which account for £20,000 of the total operating loss and are highly labour intensive to service. National events are run by national governing bodies (Scottish Gymnastics etc) and also mean Bell's is out of use for local communities for around a third of weekends in each year.
- 5.18 **The total anticipated minimum capital spend of over £18M over the next 5 years needs to be carefully considered in Best Value terms, alongside consolidating the Perth leisure offer at a single, new build facility capable of running cost efficiencies through building layout and energy efficient building standards.**
- 5.19 Usage and market analysis carried out for this Review suggests a single site facility should focus on the key leisure activities most widely used by the local population and where usage trends indicate at least steady state, if not growth. This also suggests leisure water, ice and indoor bowling are removed from the current approved accommodation schedule for PH20, helping to address affordability and longer-term financial sustainability risks. The following facilities would remain in the accommodation schedule:
- 25m, 8 lane Traditional Swimming Pool including moveable floor.
  - Teaching Pool
  - Fitness Gym
  - Studios (Group, multi-purpose space)
  - Sports Hall
  - Family Play Activity
- 5.20 The current PLP/Dewars Centre site is likely still the optimum location for access and parking and current swimming provision can be maintained whilst new build is underway.

## 5.21 Summary Of Key Findings

| Issue                                                     | Finding                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Likely future usage trends and needs</b>               | <ul style="list-style-type: none"> <li>• <b>Swimming</b> is the leisure activity in which most people take part, accounting for <b>58%</b> of all usage. Leisure swimming is declining, but swimming lessons/classes are growing.</li> <li>• <b>Gym/fitness classes</b> are the second most widely used activity accounting for <b>28%</b> of all usage.</li> <li>• <b>Sports Halls</b> are key leisure assets across P&amp;K, accounting for <b>6%</b> of all usage.</li> <li>• <b>Curling, indoor bowling and skating</b> account for <b>3%</b> of all usage, with declining use of curling and bowling facilities.</li> </ul>                                                        |
| <b>Accessibility: wider communities and schools</b>       | <ul style="list-style-type: none"> <li>• <b>Overall, accessibility to leisure is good</b> across P&amp;K given its geography and population spread.</li> <li>• <b>Access to swimming pools across P&amp;K is important given participation levels.</b></li> <li>• <b>Between 70-84%</b> of the population can access a pool, sports hall, gym or fitness class by car within 20 minutes and <b>28-39%</b> of the population can access them by public transport within 20 minutes.</li> <li>• <b>School use of LAL facilities in daytime is low at around 5%</b></li> <li>• There is very little usage by wider communities of sports facilities based at non-Campus schools</li> </ul> |
| <b>Subsidy requirements &amp; operating losses</b>        | <ul style="list-style-type: none"> <li>• <b>Public subsidy is key to maintaining certain leisure activities</b> - but decisions are required on where PKC subsidy is best spent.</li> <li>• <b>Subsidy per head for PLP and Bell's is low</b> at less than £3 but their combined annual operating loss is <b>£1.3M</b> due to the age and inefficient design of the buildings.</li> </ul>                                                                                                                                                                                                                                                                                               |
| <b>Capital spend requirements: repair and maintenance</b> | <ul style="list-style-type: none"> <li>• <b>Total capital investment over the next 5 years is estimated at £6.3M</b> for all current LAL facilities including Campuses and Community Halls but excluding secondary school sports facilities</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Energy efficiency</b>                                  | <ul style="list-style-type: none"> <li>• <b>Energy efficiency measures can be introduced but at a total estimated cost of £12-15M.</b> Because of the functionality of wetside facilities and building age, these measures may not payback within reasonable timeframes (or at all).</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Perth city centre leisure offer</b>                    | <ul style="list-style-type: none"> <li>• <b>If retained, the 3 main leisure venues (PLP, Bell's and Dewars) require £18M spend over the next 5 years</b> on repairs, reinstatement of Bell's and energy efficiency measures.</li> <li>• <b>The current PLP/Dewars site remains the likely best value option for consolidating leisure provision under one roof.</b></li> </ul>                                                                                                                                                                                                                                                                                                          |

## 6. RECOMMENDATIONS

6.1 Based on findings outlined in this report, the following recommendations are made:

| Issue                                  | Recommendation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Perth city provision                   | <ol style="list-style-type: none"> <li>1. <b>Leisure provision should be consolidated onto one site</b>, probably at Perth Leisure Pool/Dewars Centre although other site options should be investigated.</li> <li>2. <b>The facilities mix previously proposed for PH20 should be reduced</b> in light of Review findings in relation to usage and market trends, and affordability factors.</li> <li>3. <b>A costed Transition Plan for the next 3-5 years</b> is required to set out: <ul style="list-style-type: none"> <li>• Where interim leisure provision can be relocated whilst Bell's remains out of use and PH20 is re-scoped. Alternative location for gym/group fitness provision is a priority given usage levels.</li> <li>• How key alternative venues including Dewars, secondary schools, Glenearn /North Inch Community Campuses and Perth College can be utilised to provide interim provision.</li> </ul> </li> <li>4. <b>Transition funding should be allocated</b> to support delivery of interim provision.</li> <li>5. <b>Essential/compliance spend on PLP and Dewars maintenance</b> should be maintained within LAL's planned maintenance programme.</li> </ol> |
| Energy efficiency                      | <ol style="list-style-type: none"> <li>6. <b>Proceed with energy efficiency measures for Live Active Loch Leven and Strathearn</b></li> <li>7. Additional spend on PLP, Bell's and Dewars on energy efficiency should not be progressed pending re-scoping of the PH20 project.</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Swimming                               | <ol style="list-style-type: none"> <li>8. <b>Business cases should be prepared for upgrading facilities at Strathearn Campus and Live Active Loch Leven.</b> Together with current/planned investment in Blairgowrie and Perth this will ensure good access to swimming is maintained across P&amp;K. It will also ensure other popular facilities (gym/fitness classes) are well maintained in localities outside Perth.</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Accessibility: programming and booking | <ol style="list-style-type: none"> <li>9. <b>Booking and payment systems should be consolidated for all leisure facilities operated by LAL and in secondary schools to create a 'one stop shop' for users, in line with the Physical Activity and Sports Strategy.</b></li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|--------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Accessibility:<br/>Community Halls</b></p> | <p><b>10. Consider a capital fund in 24/25 budget to facilitate Community Asset Transfer as potentially as match funding for community organisations.</b> Community Halls are used for delivering group fitness and other wellbeing activities but are increasingly difficult for LAL to operate centrally given their number and widely dispersed locations. Several communities have expressed interest in CAT, but the Halls require investment to encourage communities to take them on.</p> |
|--------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## 7. NEXT STEPS

- 7.1 Implementing the Review recommendations should be taken forward in conjunction with recommendations from the ALEO Transformation Review in relation to property rationalisation.
- 7.2 The issues relating to future provision of leisure in Perth city require resolution as a priority. The following next steps from January 2024 onwards are proposed:
- Develop a costed Transition Plan setting out where, how and why interim leisure provision will be delivered in Perth whilst outstanding issues with PLP and Bell's in particular are resolved and the PH20 project is re-scoped.
  - Revise the outline business case and facilities mix options approved in 2021 for the PH20 project for Perth Leisure Pool/Dewars Centre, on the assumption all wet site and dry side facilities currently on 3 sites (including Bells) are consolidated onto a single site.
  - Complete a site options appraisal for these revised facilities mix, and identify a recommended site.
- 7.3 As set out in the recommendations, business cases are required to address maintenance and renewal requirements at Live Active Loch Leven and Strathearn. |These are key 'anchor' facilities for swimming, gym and fitness provision in our localities. Wider work is underway to consolidate the leisure and cultural offer in Pitlochry on a single site.
- 7.4 Continued progress is required on the Community Asset Transfer of Community Halls, with consideration in the Council's capital programme of further investment required for these buildings to enable communities to take on ownership and/or management on a sustainable basis.

## 8. CONCLUSIONS

- 8.1 A Transformation Review of leisure assets has been completed in light of significant leisure asset cost pressures and wider change drivers, including changing customer use of leisure facilities and energy efficiency obligations. The Review has identified significant issues and risks for the Council and LAL relating to both revenue and capital expenditure requirements. The Review sets out 10 recommendations to address this with preparatory work from January 2024 onwards, for integration within the Council's wider capital programme and property asset management plans.

### Author

| Name            | Designation                            | Contact Details                                                                                      |
|-----------------|----------------------------------------|------------------------------------------------------------------------------------------------------|
| Fiona Robertson | Head of Culture and Community Services | (01738) 475000<br><a href="mailto:ComCommitteeReports@pkc.gov.uk">ComCommitteeReports@pkc.gov.uk</a> |

### Approved

| Name        | Designation     | Date |
|-------------|-----------------|------|
| Thomas Glen | Chief Executive |      |

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## 1. IMPLICATIONS, ASSESSMENTS, CONSULTATION AND COMMUNICATION

| <b>Strategic Implications</b>                       | <b>Yes / None</b> |
|-----------------------------------------------------|-------------------|
| Local Outcomes Improvement Plan                     | <b>Yes</b>        |
| Corporate Plan                                      | <b>Yes</b>        |
| <b>Resource Implications</b>                        |                   |
| Financial                                           | <b>Yes</b>        |
| Workforce                                           | <b>None</b>       |
| Asset Management (land, property, IST)              | <b>None</b>       |
| <b>Assessments</b>                                  |                   |
| Equality Impact Assessment                          | <b>None</b>       |
| Strategic Environmental Assessment                  | <b>None</b>       |
| Sustainability (community, economic, environmental) | <b>None</b>       |
| Legal and Governance                                | <b>None</b>       |
| Risk                                                | <b>Yes</b>        |
| <b>Consultation</b>                                 |                   |
| Internal                                            | <b>None</b>       |
| External                                            | <b>None</b>       |
| <b>Communication</b>                                |                   |
| Communications Plan                                 | <b>Yes</b>        |

### 1. Strategic Implications

#### Local Outcomes Improvement Plan

1.1 This Review impacts on the following aspects of the Local Outcomes Improvement Plan

- (i) Poverty and cost of living
- (ii) Mental and physical wellbeing

#### Corporate Plan

1.2 This Review impacts on the following priorities within the Council's Corporate Plan:

[Corporate Plan Priority: Tackling poverty](#)

[Corporate Plan Priority: Tackling climate change and supporting sustainable places](#)

[Corporate Plan Priority: Enabling our children and young people to achieve their full potential](#)

[Corporate Plan Priority: Supporting and promoting physical and mental wellbeing](#)

## 2. Resource Implications

### Financial

- 2.1 There are financial implications to this report set out in section 8.

### Workforce

- 2.2 There are no immediate workforce implications to this report although any consolidation or disinvestment in leisure assets may have workforce implications for LAL and PKC.

### Asset Management (land, property, IT)

- 2.3 The asset management implications are contained within the report.

## 3. Assessments

- 3.1 The report has been considered under the Corporate Equalities Impact Assessment process (EqIA) with the following outcome:

- (i) Assessed as **not relevant** for the purposes of EqIA. Equalities Impact Assessments will be prepared for any consolidation/disinvestment recommendations if approved.

### Strategic Environmental Assessment

- 3.2 The Environmental Assessment (Scotland) Act 2005 places a duty on the Council to identify and assess the environmental consequences of its proposals.
- 3.3 The report has been considered under the Act and, no action is required as the Act does not apply to the matters presented in this report. This is because the Committee are requested to note the contents of the report only and the Committee are not being requested to approve, adopt or agree to an action or to set the framework for future decisions.

### Sustainability

- 3.4 Under the provisions of the Local Government in Scotland Act 2003 the Council has to discharge its duties in a way which contributes to the achievement of sustainable development. Under the Climate Change (Scotland) Act 2009 the Council also has a duty relating to climate change and, in exercising its functions must act:
- in the way best calculated to delivery of the Act's emissions reduction targets;
  - in the way best calculated to deliver any statutory adaptation programmes; and

- in a way that it considers most sustainable.

3.5 If approved the recommendations from this report will support the Council's discharging of its duties in relation to the Act.

#### Legal and Governance

3.6 There are no immediate legal and governance implications to this report.

#### Risk

3.7 A risk profile will be prepared to support implementation of these recommendations if approved.

### **4. Consultation**

#### Internal

4.1 Transformation Board, the Strategic Property Services and Strategic Lead, Finance have been consulted in the preparation of this report.

#### External

4.2 Live Active Leisure have been consulted in the preparation of this report.

### **5. Communication**

5.1 A Communications Plan will be prepared to support implementation of the recommendations if approved.

### **2. BACKGROUND PAPERS**

2.1 Appendices: Review scope (App 1).

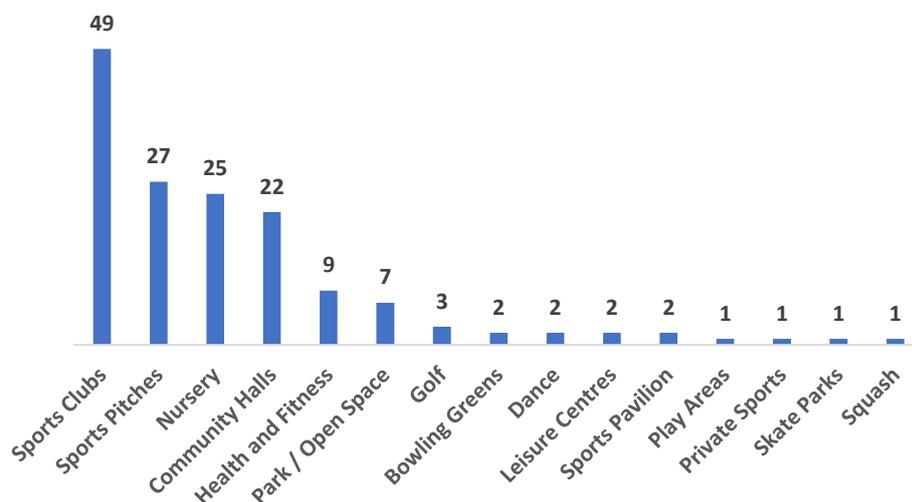
## SUMMARY OF KEY ISSUES BY LOCALITY

### Perth City

#### Current Sport and Leisure Provision

| Category         | Name                           | Asset Count |
|------------------|--------------------------------|-------------|
| Leisure Centres  | Bell's Sports Centre           | 1           |
|                  | Dewar's Centre                 | 1           |
|                  | George Duncan Athletics Arena  | 1           |
|                  | Glenearn Community Campus      | 1           |
|                  | North Inch Community Campus    | 1           |
|                  | Perth Leisure Pool             | 1           |
|                  | <b>Total</b>                   | <b>6</b>    |
| Secondary School | Bertha Park High School        | 1           |
|                  | Perth Academy                  | 1           |
|                  | Perth Grammar School           | 1           |
|                  | Perth High School              | 1           |
|                  | <b>Total</b>                   | <b>4</b>    |
| Community Halls  | Moncreiffe Community Centre    | 1           |
|                  | North Muirton Community Centre | 1           |
|                  | Tulloch Community Centre       | 1           |
|                  | <b>Total</b>                   | <b>3</b>    |
| <b>Total</b>     |                                | <b>13</b>   |

#### Other Sports and Physical Activity Assets



#### Population

The National Records of Scotland (NRS) show the population of Perth City Locality is currently estimated to be close to 47,000 residents. In light of planned housing developments, an additional population growth of 1,500 residents is estimated to occur by the year 2034. This increase will create additional demand for sport and physical activities within the existing infrastructure.

## Accessibility

| Travel time | Travel mode                                                                       | Swimming Pool | Sportshall | Fitness Gym | Group Fitness |
|-------------|-----------------------------------------------------------------------------------|---------------|------------|-------------|---------------|
| 20 Minutes  |  | 100%          | 100%       | 100%        | 100%          |
| 20 Minutes  |  | 43%           | 64%        | 48%         | 48%           |

## Usage and Council Spend on Sports and Physical Activity

### Usage

| Participation Site       | 2019-20        | 2021-22        | 2022-23        |
|--------------------------|----------------|----------------|----------------|
| Perth Leisure Pool       | 338,582        | 138,568        | 354,546        |
| Bell's Sports Centre     | 195,941        | 118,770        | 261,924        |
| North Inch Campus        | 40,372         | 25,823         | 36,440         |
| Dewars                   | 29,464         | 18,423         | 40,813         |
| Tulloch Community Hall   | *7,770         | 2,525          | 7,618          |
| Moncrieff Community Hall | *4,890         | 766            | 2,732          |
| Glenearn                 | *2100          |                | 1,783          |
| <b>Total</b>             | <b>619,119</b> | <b>304,875</b> | <b>705,856</b> |
| Perth Academy            |                |                | 4,385          |
| Perth Grammar            |                |                | 1,562          |
| Perth High Games         |                |                | 5,533          |
| Bertha Park High         |                |                | 13,879         |
| <b>Total</b>             | <b>619,119</b> | <b>304,875</b> | <b>731,215</b> |

Please note that 2020-21 data has not been included due to the significant impact of Covid-19 on participation levels. \* Denotes an estimated level of usage. \*\*Estimated.

### Top 10 Activities Usage

The table below highlights the top 10 sports and physical activities for LAL venues in Perth City. 84.6% of usage comes from these 10 activity areas. It shows that swimming still remains the activity with the highest participation. Fitness Gym, sports clubs (GoPlay Hire Attendance) and classes also have high participation as does swimming lessons, events and sportshall activities.

| Activity Description              | 2022-23        | % of All Usage |
|-----------------------------------|----------------|----------------|
| GoPlay Swim                       | 227,462        | 34.75%         |
| Fitness Gym                       | 73,244         | 11.19%         |
| GoPlay Hire Attendance            | 56,478         | 8.63%          |
| Fitness Classes                   | 39,297         | 6.00%          |
| Swimming Lessons                  | 36,584         | 5.59%          |
| Events Admission                  | 34,795         | 5.31%          |
| GoPlay Sportshall                 | 28,140         | 4.30%          |
| Health Suite                      | 25,843         | 3.95%          |
| Fitness Swim                      | 17,023         | 2.60%          |
| GoPlay Ice                        | 16,289         | 2.49%          |
| <b>Top 10 Total Usage</b>         | <b>555,155</b> | <b>84.80%</b>  |
| <b>All Activities Total Usage</b> | <b>665,008</b> |                |

### Top 10 Activities Income

The table below highlights the top 10 sports and physical activities that generate the most income for LAL venues in Perth City. 98% of comes from these 10 activity areas. It shows that Sport GoPlay activities account for almost 46% of income. Sports GoPlay includes income from casual swimming, clubs, sports pitches and sportshall activities. Membership fees is income from the various fitness membership packages offered by LAL and accounts for 21% of income. Fun Coached income comes from organised coaching activities like swimming lessons. Fitness class and fitness gym income come from customers who pay for these activities on a pay as you go basis rather than through a monthly membership.

| Activity Description              | 2022-23           | % of All Income |
|-----------------------------------|-------------------|-----------------|
| Sport GoPlay                      | £1,280,322        | 45.85%          |
| Membership Fee                    | £591,905          | 21.20%          |
| Fun Coached                       | £402,922          | 14.43%          |
| Merchandise                       | £127,155          | 4.55%           |
| Events Income                     | £110,412          | 3.95%           |
| Wellbeing                         | £87,315           | 3.13%           |
| Steps Coached                     | £52,559           | 1.88%           |
| Fitness Gym                       | £31,100           | 1.11%           |
| Fitness Classes                   | £30,652           | 1.10%           |
| Beginnings Coached                | £20,805           | 0.75%           |
| <b>Top 10 Total Usage</b>         | <b>£2,735,147</b> | <b>97.95%</b>   |
| <b>All Activities Total Usage</b> | <b>£2,792,275</b> |                 |

## Revenue Spend

The operating loss is highest at Perth Leisure Pool and Bell's Sports Centre as is the activity income. The total operating loss for the Perth LAL venues was almost £1.7m in 2022/23. Gleanearn has the highest subsidy per head due to its very low usage. Dewars is also high due to its relatively low usage and high operating deficit. The two halls in Perth also make a small operating loss however, the four secondary schools generate a small operating surplus. There is also considerable investment in maintenance required of £3.83m over the next 5 years for LAL venues and a further £193k in Halls.

| Venue                          | Income 2022/23    | Operating loss/surplus 2022/23 | LAL Overheads 2022/23 | Subsidy Per Head | Capital (5 Yrs)    |
|--------------------------------|-------------------|--------------------------------|-----------------------|------------------|--------------------|
| Perth Leisure Pool             | £1,658,945        | *£769,927                      | £363,374              | £2.17            | £873,460           |
| Bell's Sports Centre           | £793,934          | *£570,856                      | £218,326              | £2.17            | £1,131,085         |
| Dewars Centre                  | £246,282          | *£346,670                      | £62,478               | £8.49            | £1,868,837         |
| Gleanearn Community Campus     | £3,168            | *£2,686                        | £0                    | £1.50            | n/a                |
| North Inch Community Campus    | £79,581           | £8,399                         | £35,165               | ***£0.23         | n/a                |
| <b>Total (LAL Venues)</b>      | <b>£2,781,910</b> | <b>£1,681,740</b>              | <b>£679,343</b>       |                  | <b>£3,873,382</b>  |
| Moncreiffe Community Centre    | £3,856            | £16,835                        |                       | £6.16            | Not available      |
| Tulloch Community Hall         | £6,509            | £6,477                         |                       | £0.85            | £193,145           |
| <b>Total (Halls)</b>           | <b>£10,365</b>    | <b>£23,312</b>                 |                       |                  | <b>£193,145</b>    |
| Perth Grammar                  | £1,668            | £583                           |                       | £0.37            | £15,474,970        |
| Perth High                     | £11,073           | £1,605                         |                       | £0.29            | £2,563             |
| Perth Academy                  | £12,848           | £8,164                         |                       | £1.86            | £14,308,707        |
| Bertha Park High               | £35,328           | £28,776                        |                       | £2.07            | n/a                |
| <b>Total Secondary Schools</b> | <b>£60,917</b>    | <b>£39,128</b>                 |                       |                  | <b>£29,786,240</b> |
| <b>Grand Total</b>             | <b>£2,853,192</b> | <b>£1,665,924</b>              |                       |                  | <b>£33,852,767</b> |

\*Include LAL Overhead Charges, \*\* Includes an apportionment of school operating costs, Red denotes Loss, Black denotes surplus.\*\*\*Denotes a Surplus

## Environmental Footprint

| Asset                       | Current Emissions <sup>1</sup> | % Year Energy Costs <sup>2</sup> | Indicative Capital Investment | Payback |
|-----------------------------|--------------------------------|----------------------------------|-------------------------------|---------|
| Perth Leisure Pool          | 1,288                          | £2,370,300                       | £650,000                      | 4 years |
| Dewars                      | 374                            | £935,725                         | n/a                           | n/a     |
| Bells Sports Centre         | 627                            | £809,360                         | n/a                           | n/a     |
| North Inch Community Campus | *476                           | *£1,267,970                      | n/a                           | n/a     |
| Gleanearn Community Campus  | *171                           | *£488,345                        | n/a                           | n/a     |

<sup>1</sup> Tonnes of CO<sup>2</sup>. This Includes Scope 1,2 and 3 Emissions

<sup>2</sup> Based on current prices

|              |              |                   |          |
|--------------|--------------|-------------------|----------|
| <b>Total</b> | <b>2,936</b> | <b>£5,871,700</b> | <b>0</b> |
|--------------|--------------|-------------------|----------|

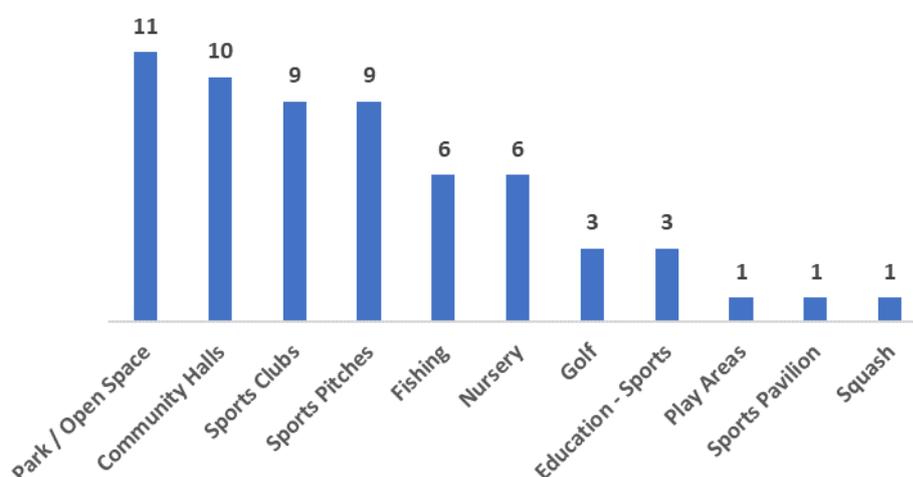
\*This reflects the energy costs for the whole facility and not apportioned for sports and leisure provision

## Almond and Earn Locality

### Current Provision

There are no PKC funded venues within the Almond and Earn locality other than 5 primary schools, only two of which are currently used for community sport and leisure activities on a **very** infrequent basis (Abernethy and Dunbarney). However, the majority of the Almond and Earn population are within reasonable reach of Perth City sports and leisure venues.

### Other Sport and Physical Activity Assets



### Population

Population projections from the National Records of Scotland (NRS) show the population of the Almond and Earn Locality is currently estimated to be close to 10,000 residents. The NRS anticipates a small increase of approximately 800 within the eight-year span from 2022 to 2030. Furthermore, in light of planned housing developments, an additional population growth of 1,600 residents is estimated to occur by the year 2034. This increase will create additional demand for sport and physical activities within the existing infrastructure.

## Accessibility

| Travel time | Travel mode                                                                       | Swimming Pool | Sportshall | Fitness Gym | Group Fitness |
|-------------|-----------------------------------------------------------------------------------|---------------|------------|-------------|---------------|
| 20 Minutes  |  | 59%           | 68%        | 59%         | 59%           |
| 20 Minutes  |  | 0%            | 0%         | 0%          | 0%            |

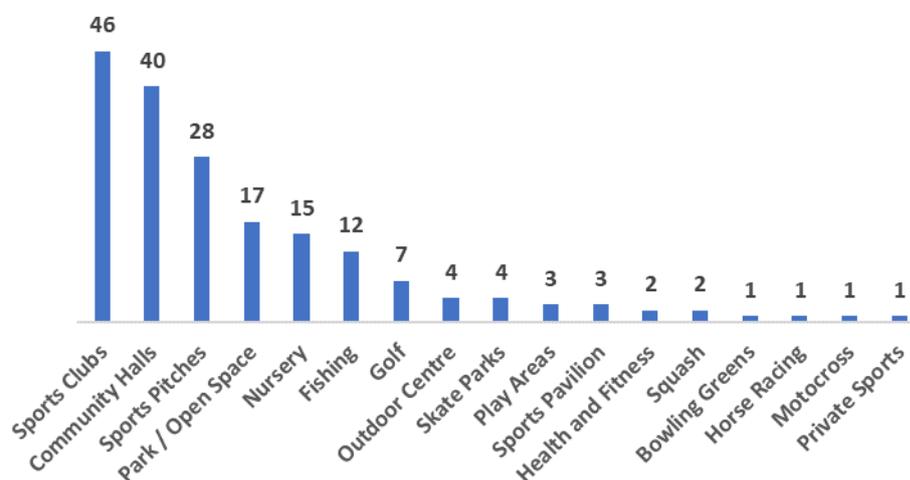
This table shows the % of the locality population that can access sports and physical activity assets within 20 minutes traveling at Peak times

## Eastern Perthshire

### Current Provision

| Category         | Name                                      | Asset Count |
|------------------|-------------------------------------------|-------------|
| Leisure Centres  | Live Active Blairgowrie Recreation Centre | 1           |
| Secondary School | Blairgowrie High School                   | 1           |
| Community Halls  | Scone Public Hall                         | 1           |
| Total            |                                           | 3           |

### Other Sport and Physical Activity Assets



## Population

Projections from the National Records of Scotland (NRS), estimate the population of the Easter Perthshire to be close to 37,000 residents. The NRS anticipates a small decrease of approximately 30 within the eight-year span from 2022 to 2030.

Furthermore, in light of planned housing developments, additional population growth of 5,000 residents is estimated to occur by the year 2034. This increase will create additional demand for sport and physical activities within the existing infrastructure.

## Accessibility

| Travel time | Travel mode                                                                       | Swimming Pool | Sportshall | Fitness Gym | Group Fitness |
|-------------|-----------------------------------------------------------------------------------|---------------|------------|-------------|---------------|
| 20 Minutes  |  | 47%           | 60%        | 60%         | 60%           |
| 20 Minutes  |  | 26%           | 26%        | 26%         | 26%           |

This table shows the % of the locality population that can access sports and physical activity assets within 20 minutes traveling at Peak times

## Usage and Council Spend on Sports and Physical Activity

### Usage

| Participation Site                             | 2019-20       | 2021-22       | 2022-23       |
|------------------------------------------------|---------------|---------------|---------------|
| Live Active Blairgowrie                        | 83,947        | 37,395        | 56,076        |
| Blairgowrie Community Campus Recreation Centre | 5,632         | 1,423         | 4,178         |
| Scone Community Hall                           | *6,536        | 138           | 2,842         |
| Alyth Primary Community Wing                   |               |               | 25            |
| Inchture Primary School                        |               |               | 102           |
| Invergowrie Primary School                     |               |               | 612           |
| Ratray Community Connect                       |               |               | 1244          |
| Ratray Primary School                          |               |               | 34            |
| <b>Total</b>                                   | <b>96,115</b> | <b>38,956</b> | <b>65,113</b> |

Please note that 2020-21 data has not been included due to the significant impact of Covid-19 on participation levels. \* Denotes an estimated level of usage

### Top 10 Activities Usage

The table below highlights the top 10 sports and physical activities for LAL venues in Eastern Perthshire. 91% of usage comes from these 10 activity areas. It shows that swimming and swimming lessons remain the activities with the highest participation. Sports clubs (GoPlay Hire Attendance) and fitness gym and classes also have high participation as does fitness swimming and sportshall activities.

| Activity Description   | 2022-23 | % of All Usage |
|------------------------|---------|----------------|
| GoPlay Swim            | 13,241  | 21.06%         |
| Swimming Lessons       | 10,116  | 16.09%         |
| GoPlay Hire Attendance | 9,274   | 14.75%         |
| Fitness Classes        | 5,600   | 8.91%          |
| Fitness Gym            | 5,371   | 8.54%          |
| GoPlay Sportshall      | 3,636   | 5.78%          |
| Fitness Swim           | 2,989   | 4.76%          |

|                                   |               |               |
|-----------------------------------|---------------|---------------|
| P.C.H. Playgroup                  | 2,675         | 4.26%         |
| Fun Swim Coached                  | 2,330         | 3.71%         |
| Prim Campus Fun T Time            | 1,938         | 3.08%         |
| <b>Top 10 Total Usage</b>         | <b>57,170</b> | <b>90.95%</b> |
| <b>All Activities Total Usage</b> | <b>62,860</b> |               |

### Top 10 Activities Income

The table below highlights the top 10 sports and physical activities that generate the most income for LAL venues in Eastern Perthshire. 99% of comes from these 10 activity areas. It shows that Fun Coached income accounts for almost 35% of total income and comes from organised coaching activities like swimming lessons. Sport GoPlay activities account for 28% of income. Sports GoPlay include income from casual swimming, clubs, sports pitches, and sports hall activities. Membership fees is income from the various fitness membership packages offered by LAL. Fitness class and fitness gym income come from customers who pay for these activities on a pay as you go basis rather than through a monthly membership.

| Activity Description               | 2022-23         | % of All Income |
|------------------------------------|-----------------|-----------------|
| Fun Coached                        | £92,778         | 34.90%          |
| Sport GoPlay                       | £74,428         | 28.00%          |
| Membership Fee                     | £64,897         | 24.42%          |
| Fitness Classes                    | £9,911          | 3.73%           |
| Non Sporting Venue Hire            | £4,882          | 1.84%           |
| Merchandise                        | £4,301          | 1.62%           |
| Fitness Gym                        | £4,197          | 1.58%           |
| Wellbeing                          | £3,298          | 1.24%           |
| Steps Coached                      | £3,008          | 1.13%           |
| Beginnings Coached                 | £2,136          | 0.80%           |
| <b>Top 10 Total Income</b>         | <b>£263,836</b> | <b>99.26%</b>   |
| <b>All Activities Total Income</b> | <b>£265,802</b> |                 |

## Revenue Spend

The operating loss is highest at Live Active Blairgowrie totalling almost £200k in 2022/23. The majority of income also comes from Live Active Blairgowrie, almost £250k.

| Venue                        | Income 2022/23  | Operating loss/surplus 2022/23 | LAL Overheads 2022/23 | Subsidy Per Head | Capital (5 Yrs)              |
|------------------------------|-----------------|--------------------------------|-----------------------|------------------|------------------------------|
| Live Active Blairgowrie      | £249,763        | *£198,352                      | £87,914               | £3.53            | New facility in construction |
| Blairgowrie Community Campus | £39,236         | *£9,392                        | £5,862                | £2.24            | n/a                          |
| <b>Total (LAL Venues)</b>    | <b>£288,999</b> | <b>£207,744</b>                | <b>£93,776</b>        |                  |                              |

\*Include LAL Overhead Charges, \*\* Includes an apportionment of school operating costs, Red denotes Loss, Black denotes surplus

## Environmental Footprint

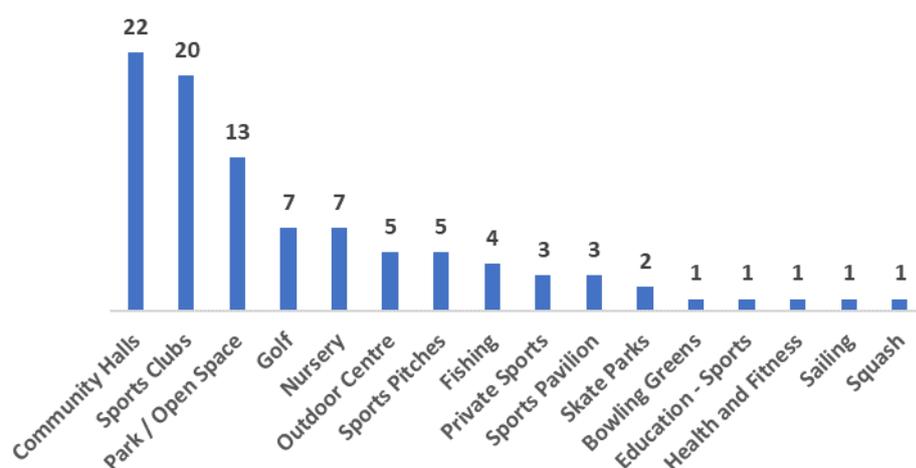
The significant facility in this area is the Blairgowrie Recreation Centre. This is being redeveloped to Passivhaus standard and therefore its operational carbon footprint is targeted at a very high level.

## Highland Perthshire

### Current Provision

| Category         | Name                              | Asset Count |
|------------------|-----------------------------------|-------------|
| Community Halls  | Pitlochry Town Hall               | 1           |
|                  | <b>Total</b>                      | <b>1</b>    |
| Leisure Centres  | Breadalbane Community Campus      | 1           |
|                  | Live Active Atholl Leisure centre | 1           |
|                  | <b>Total</b>                      | <b>2</b>    |
| Secondary School | Breadalbane Academy               | 1           |
|                  | Pitlochry High School             | 1           |
|                  | <b>Total</b>                      | <b>2</b>    |
| <b>Total</b>     |                                   | <b>5</b>    |

## Other Sport and Physical Activity Assets



## Population

Projections from the National Records of Scotland (NRS), estimate the population of Highland Perthshire to be close to 10,000 residents. The NRS anticipates a small decrease of approximately 200 within the eight-year span from 2022 to 2030. Furthermore, in light of planned housing developments in the Aberfeldy and Pitlochry areas, additional population growth of 1,200 residents is estimated to occur by the year 2034. This increase will create some additional demand for sport and physical activities within the existing infrastructure.

## Accessibility

| Travel time | Travel mode                                                                         | Swimming Pool | Sportshall | Fitness Gym | Group Fitness |
|-------------|-------------------------------------------------------------------------------------|---------------|------------|-------------|---------------|
| 20 Minutes  |  | 36%           | 86%        | 86%         | 86%           |
| 20 Minutes  |  | 23%           | 52%        | 52%         | 52%           |

This table shows the % of the locality population that can access sports and physical activity assets within 20 minutes traveling at Peak times

## Usage Council Spend on Sports and Physical Activity

### Usage

| Participation Site  | 2019-20       | 2021-22       | 2022-23       |
|---------------------|---------------|---------------|---------------|
| Breadalbane Campus  | 35,247        | 27,216        | 34,423        |
| Live Active Atholl  | 16,804        | 2,595         | 8,185         |
| Pitlochry Town Hall | *14,610       | 360           | 8,162         |
| <b>Total</b>        | <b>66,661</b> | <b>30,171</b> | <b>50,770</b> |

Please note that 2020-21 data has not been included due to the significant impact of Covid-19 on participation levels. \* Denotes an estimated level of usage

## Top 10 Activities Usage

The table below highlights the top 10 sports and physical activities for LAL venues in Highland Perthshire. 91% of usage comes from these 10 activity areas. It shows that fitness gym and sports clubs are the activities with the highest participation. Fitness swimming, swimming lesson and casual swimming also have high participation.

| Activity Description              | 2022-23       | % of All Usage |
|-----------------------------------|---------------|----------------|
| Fitness Gym                       | 6,726         | 12.78%         |
| GoPlay Hire Attendance            | 6,632         | 12.60%         |
| Fitness Swim                      | 6,389         | 12.14%         |
| Swimming Lessons                  | 6,086         | 11.56%         |
| GoPlay Swim                       | 5,504         | 10.46%         |
| Live Active Core                  | 5,214         | 9.91%          |
| Fitness Classes                   | 3,646         | 6.93%          |
| A.L.C. Townhall                   | 2,900         | 5.51%          |
| Wellbeing Class                   | 2,666         | 5.06%          |
| GoPlay Pitches Attendance         | 2,348         | 4.46%          |
| <b>Top 10 Total Usage</b>         | <b>48,111</b> | <b>91.40%</b>  |
| <b>All Activities Total Usage</b> | <b>52,640</b> |                |

## Top 10 Activities Income

The table below highlights the top 10 sports and physical activities that generate the most income for LAL venues in Highland Perthshire. Almost 100% comes from these 10 activity areas. It shows that Membership fees account for 30% of total income and comes from the various fitness membership packages offered by LAL. Fun Coached income comes from organised coaching activities like swimming lessons and accounts for 26% of income. Sports GoPlay include income comes from casual swimming, clubs, sports pitches and sportshall activities. Fitness class and fitness gym income come from customers who pay for these activities on a pay as you go basis rather than through a monthly membership.

| Activity Description    | 2022-23 | % of All Income |
|-------------------------|---------|-----------------|
| Membership Fee          | £64,584 | 30.09%          |
| Fun Coached             | £56,662 | 26.40%          |
| Sport GoPlay            | £35,575 | 16.58%          |
| Non Sporting Venue Hire | £24,787 | 11.55%          |
| Fitness Classes         | £14,141 | 6.59%           |
| Fitness Gym             | £7,694  | 3.58%           |
| Wellbeing               | £6,603  | 3.08%           |
| Merchandise             | £2,515  | 1.17%           |
| Steps Coached           | £1,176  | 0.55%           |

|                                    |                 |               |
|------------------------------------|-----------------|---------------|
| Beginnings Coached                 | £721            | 0.34%         |
| <b>Top 10 Total Income</b>         | <b>£214,458</b> | <b>99.92%</b> |
| <b>All Activities Total Income</b> | <b>£214,623</b> |               |

## Revenue Spend

The operating loss is highest at Breadalbane Community Campus and Live Active Atholl totalling £203k in 2022/23. The net revenue spend, which takes income into account is £203k. The combined income from both these venues is £190k. Pitlochry Town hall makes a small operating loss of almost £6k. Live Active Atholl has a significant subsidy per head due to its relatively low level of usage and high operating loss. Live Active Atholl will also require £140 investment in maintenance over the next five years.

| Venue                               | Income 2022/23  | Operating loss/surplus 2022/23 | LAL Overheads 2022/23 | Subsidy Per Head | Capital (5 Yrs) |
|-------------------------------------|-----------------|--------------------------------|-----------------------|------------------|-----------------|
| <b>Breadalbane Community Campus</b> | £156,467        | *£110,388                      | £52,748               | £3.20            | n/a             |
| <b>Live Active Atholl</b>           | £33,783         | *£92,799                       | £23,444               | £11.33           | £431,685        |
| <b>Total (LAL Venues)</b>           | <b>£190,250</b> | <b>£203,187</b>                | <b>£76,192</b>        |                  | <b>£140,303</b> |
| <b>Pitlochry Town Hall</b>          | £24,373         | £5,881                         |                       | £0.72            | £202,772        |
| <b>Total (Halls)</b>                | <b>£24,373</b>  | <b>£5,881</b>                  |                       |                  |                 |
| <b>Grand Total</b>                  | <b>£214,623</b> | <b>£209,068</b>                | <b>£76,192</b>        |                  |                 |

\*Include LAL Overhead Charges, \*\* Includes an apportionment of school operating costs, Red denotes Loss, Black denotes surplus

## Environmental Footprint

| Asset                        | Current Emissions <sup>3</sup> | 5 Year Energy Costs <sup>4</sup> | Indicative Capital Investment | Payback |
|------------------------------|--------------------------------|----------------------------------|-------------------------------|---------|
| Breadalbane Community Campus | *681                           | *£1,085,156                      |                               |         |
| Live Active Atholl           | 39                             | £56,470                          | n/a                           | n/a     |
| <b>Total</b>                 | <b>720</b>                     | <b>£1,141,626</b>                |                               |         |

\*This reflects the energy costs for the whole facility and not apportioned for sports and leisure provision

<sup>3</sup> Tonnes of CO<sup>2</sup>. This Includes Scope 1,2 and 3 Emissions. For context a tonne of CO<sup>2</sup> is equivalent to 3,300 km driven in a petrol car, one passenger flight from Paris to New York, or 121,600 smartphones charged.

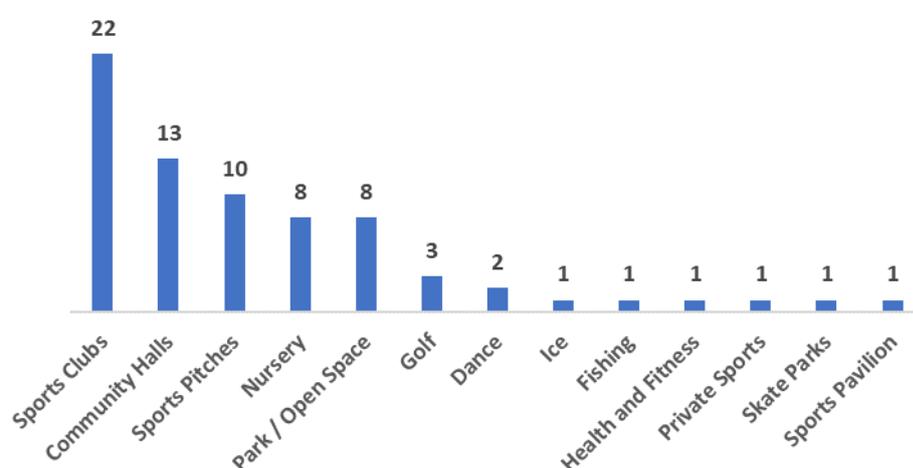
<sup>4</sup> Based on current prices

## Kinrosshire

### Current Provision

| Category         | Name                          | Asset Count |
|------------------|-------------------------------|-------------|
| Leisure Centres  | Live Active Loch Leven Centre | 1           |
|                  | Loch Leven Community Campus   | 1           |
|                  | <b>Total</b>                  | <b>2</b>    |
| Secondary School | Kinross High School           | 1           |
|                  | <b>Total</b>                  | <b>1</b>    |
| <b>Total</b>     |                               | <b>9</b>    |

### Other Sport and Physical Activity Assets



### Population

The National Records of Scotland (NRS), estimate the population of the Kinross Shire to be close to 15,000 residents. The NRS anticipates an increase of approximately 1,000 within the eight-year span from 2022 to 2030. Furthermore, in light of planned housing developments, additional population growth of a further 600 residents is projected to occur by the year 2034. These increases will create additional demand for sport and physical activities within the existing infrastructure.

### Accessibility

| Travel time | Travel mode                                                                         | Swimming Pool | Sportshall | Fitness Gym | Group Fitness |
|-------------|-------------------------------------------------------------------------------------|---------------|------------|-------------|---------------|
| 20 Minutes  |  | 92%           | 90%        | 92%         | 92%           |
| 20 Minutes  |  | 26%           | 22%        | 26%         | 26%           |

This table shows the % of the locality population that can access sports and physical activity assets within 20 minutes traveling at Peak times

## Usage and Council Spend on Sports and Physical Activity

### Usage

| Participation Site     | 2019-20        | 2021-22       | 2022-23        |
|------------------------|----------------|---------------|----------------|
| Live Active Loch Leven | 81,162         | 56,266        | 64,304         |
| Loch Leven Campus      | 60883          | 37452         | 41,232         |
| <b>Total</b>           | <b>142,045</b> | <b>93,718</b> | <b>105,536</b> |

Please note that 2020-21 data has not been included due to the significant impact of Covid-19 on participation levels.

### Top 10 Activities Usage

The table below highlights the top 10 sports and physical activities for LAL venues in Kinrosshire. 97% of usage comes from these 10 activity areas. It shows that sports clubs (GoPlay Hire Attendance), sports pitch and swimming lessons are the activities with the highest participation. Fitness swimming and casual swimming also have high participation.

| Activity Description              | 2022-23        | % of All Usage |
|-----------------------------------|----------------|----------------|
| GoPlay Hire Attendance            | 23,616         | 22.28%         |
| GoPlay Pitches Attendance         | 17,285         | 16.31%         |
| Swimming Lessons                  | 16,889         | 15.93%         |
| Fitness Swim                      | 12,226         | 11.53%         |
| GoPlay Swim                       | 11,255         | 10.62%         |
| Fitness Gym                       | 8,369          | 7.89%          |
| Fitness Classes                   | 6,438          | 6.07%          |
| GoPlay Sportshall                 | 2,885          | 2.72%          |
| Fun Term Time                     | 2,827          | 2.67%          |
| Fun Holidays                      | 1,303          | 1.23%          |
| <b>Top 10 Total Usage</b>         | <b>103,093</b> | <b>97.25%</b>  |
| <b>All Activities Total Usage</b> | <b>106,006</b> |                |

### Top 10 Activities Income

The table below highlights the top 10 sports and physical activities that generate the most income for LAL venues in Kinross-shire. Almost 100% comes from these 10 activity areas. It shows that Fun Coached income accounts for 35% of total income and comes from organised coaching activities like swimming lessons. Sport GoPlay activities account for 28% of income. Sports GoPlay include income from casual swimming, clubs, sports pitches and sportshall activities. Membership fees is income from the various fitness membership packages offered by LAL.. Fitness class and fitness gym income come from customers who pay for these activities on a pay as you go basis rather than through a monthly membership.

| Activity Description               | 2022-23         | % of All Income |
|------------------------------------|-----------------|-----------------|
| Fun Coached                        | £139,677        | 34.88%          |
| Sport GoPlay                       | £110,783        | 27.67%          |
| Membership Fee                     | £95,482         | 23.85%          |
| Fitness Classes                    | £27,783         | 6.94%           |
| Fitness Gym                        | £8,015          | 2.00%           |
| Merchandise                        | £7,477          | 1.87%           |
| Food Vending                       | £3,845          | 0.96%           |
| Beginnings Coached                 | £3,358          | 0.84%           |
| Steps Coached                      | £2,341          | 0.58%           |
| Wellbeing                          | £1,052          | 0.26%           |
| <b>Top 10 Total Income</b>         | <b>£399,813</b> | <b>99.85%</b>   |
| <b>All Activities Total Income</b> | <b>£400,422</b> |                 |

## Revenue Spend

The operating loss is highest at Live Active Loch Leven totalling almost £372k in 2022/23. LAL Loch Leven also has the highest income at £323k. Loch Leven Community Campus also makes a small operating loss of £9.7k. LAL Loch Leven also has a considerable amount of work maintenance work identified over the next five years of £683k.

| Venue                              | Income 2022/23  | Operating loss/surplus 2022/23 | LAL Overheads 2022/23 | Subsidy Per Head | Capital (5 Yrs) |
|------------------------------------|-----------------|--------------------------------|-----------------------|------------------|-----------------|
| <b>Live Active Loch Leven</b>      | £323,394        | *£372,361                      | £99,635               | £5.79            | £682,899        |
| <b>Loch Leven Community Campus</b> | £77,028         | *£9,741                        | £35,165               | £0.23            |                 |
| <b>Grand Total</b>                 | <b>£400,422</b> | <b>£382,102</b>                | <b>£134,800</b>       |                  | <b>£682,899</b> |

\*Include LAL Overhead Charges, \*\* Includes an apportionment of school operating costs, Red denotes Loss, Black denotes surplus

## Environmental Footprint

| Asset                        | Current Emissions <sup>5</sup> | 5 Year Energy Costs <sup>6</sup> | Indicative Capital Investment | Payback |
|------------------------------|--------------------------------|----------------------------------|-------------------------------|---------|
| <b>Live Active Lochleven</b> | 324                            | £618,710                         | £300,000                      | 8 years |
| Loch Leven Community Campus  | *525                           | *£915,450                        |                               |         |
| <b>Total</b>                 | <b>849</b>                     | <b>£1,534,160</b>                |                               |         |

<sup>5</sup> Tonnes of CO<sup>2</sup>. This Includes Scope 1,2 and 3 Emissions. For context a tonne of CO<sup>2</sup> is equivalent to 3,300 km driven in a petrol car, one passenger flight from Paris to New York, or 121,600 smartphones charged.

<sup>6</sup> Based on current prices

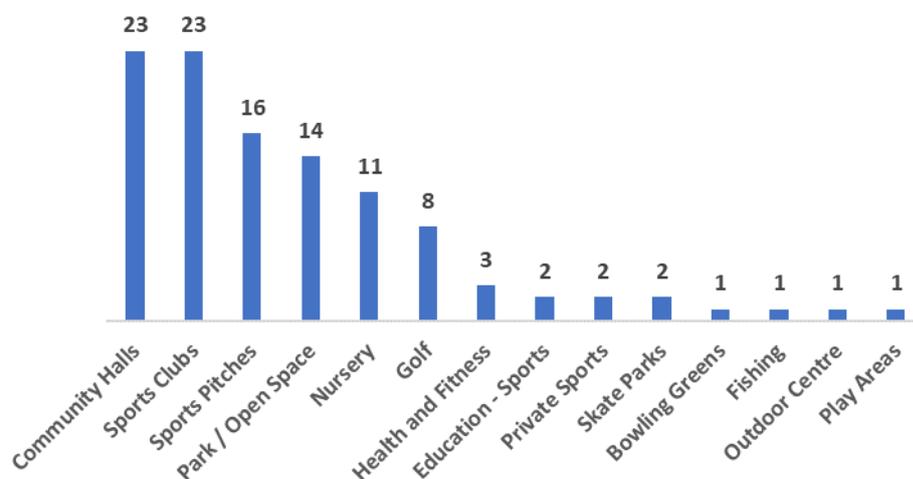
\*This reflects the energy costs for the whole facility and not apportioned for sports and leisure provision

## Strathearn and Strathallan

### Current Provision

| Category         | Name                              | Asset Count |
|------------------|-----------------------------------|-------------|
| Leisure Centres  | Auchterarder Community Sports Hub | 1           |
|                  | Strathearn Community Campus       | 1           |
|                  | <b>Total</b>                      | <b>2</b>    |
| Secondary School | Community School of Auchterarder  | 1           |
|                  | Strathearn Community Campus       | 1           |
|                  | <b>Total</b>                      | <b>2</b>    |
| Community Halls  | Aytoun Hall                       | 1           |
|                  | Blackford Village Hall            | 1           |
|                  | Dunning Village Hall              | 1           |
|                  | <b>Total</b>                      | <b>3</b>    |
| <b>Total</b>     |                                   | <b>7</b>    |

### Other Sport and Physical Activity Assets



### Population

The National Records of Scotland (NRS), estimate the population of the locality to be close to 24,000 residents. The NRS anticipates a sizeable increase of approximately 1200 within the eight-year span from 2022 to 2030. Furthermore, in light of planned housing developments, an additional population growth of 1,800 residents is projected to occur by the year 2034. This increase will create significant additional demand for sport and physical activities within the existing infrastructure.

## Accessibility

| Travel time | Travel mode                                                                       | Swimming Pool | Sportshall | Fitness Gym | Group Fitness |
|-------------|-----------------------------------------------------------------------------------|---------------|------------|-------------|---------------|
| 20 Minutes  |  | 63%           | 95%        | 95%         | 95%           |
| 20 Minutes  |  | 22%           | 34%        | 34%         | 34%           |

## Usage and Council Spend on Sports and Physical Activity

### Usage

| Participation Site          | 2019-21        | 2021-23       | 2022-24        |
|-----------------------------|----------------|---------------|----------------|
| Strathearn Community Campus | 87,489         | 66,382        | 100,123        |
| Aytoun Community Hall       | 18,050         | 5,661         | 13,706         |
| Blackford Community Hall    | 4,652          | 1,221         | 3,231          |
| Dunning Community Hall      | 8,081          | 1,196         | 2,641          |
| <b>Total</b>                | <b>118,272</b> | <b>74,460</b> | <b>119,701</b> |

Please note that 2020-21 data has not been included due to the significant impact of Covid-19 on participation levels.

### Top 10 Activities Usage

The table below highlights the top 10 sports and physical activities for LAL venues in Strathearn and Strathallan. 88% of usage comes from these 10 activity areas. It shows that use of sports pitches, clubs (P.C.H. Misc and GoPlay Hire Attendance), and swimming lessons are the activities with the highest participation. Fitness classes and casual swimming also have high participation.

| Activity Description              | 2022-23        | % of All Usage |
|-----------------------------------|----------------|----------------|
| GoPlay Pitches Attendance         | 19,249         | 15.88%         |
| P.C.H. Misc                       | 16,639         | 13.73%         |
| GoPlay Hire Attendance            | 11,999         | 9.90%          |
| Swimming Lessons                  | 10,622         | 8.76%          |
| Fitness Classes                   | 9,674          | 7.98%          |
| GoPlay Swim                       | 8,804          | 7.26%          |
| Strength Gym                      | 7,627          | 6.29%          |
| Beginnings Swim Coached           | 7,573          | 6.25%          |
| Fitness Gym                       | 7,015          | 5.79%          |
| Fitness Swim                      | 7,012          | 5.78%          |
| <b>Top 10 Total Usage</b>         | <b>106,214</b> | <b>87.62%</b>  |
| <b>All Activities Total Usage</b> | <b>121,220</b> |                |

## Top 10 Activities Income

The table below highlights the top 10 sports and physical activities that generate the most income for LAL venues in Strathearn and Strathallan. 100% comes from these 10 activity areas. It shows that Membership fees account for 36% of total income and comes from the various fitness membership packages offered by LAL. Fun Coached income comes from organised coaching activities like swimming lessons and accounts for 25% of income. Sports GoPlay include income comes from casual swimming, clubs, sports pitches and sportshall activities. Fitness class and fitness gym income come from customers who pay for these activities on a pay as you go basis rather than through a monthly membership.

| Activity Description              | 2022-23         | % of All Income |
|-----------------------------------|-----------------|-----------------|
| Membership Fee                    | £124,857        | 36.41%          |
| Fun Coached                       | £85,556         | 24.95%          |
| Sport GoPlay                      | £66,962         | 19.52%          |
| Non Sporting Venue Hire           | £30,075         | 8.77%           |
| Fitness Classes                   | £15,869         | 4.63%           |
| Fitness Gym                       | £7,777          | 2.27%           |
| Steps Coached                     | £7,772          | 2.27%           |
| Merchandise                       | £3,992          | 1.16%           |
| Wellbeing                         | £2,879          | 0.84%           |
| Fitness Personal                  | £261            | 0.08%           |
| <b>Top 10 Total Income</b>        | <b>£346,000</b> | <b>100%</b>     |
| <b>All Activities Total Usage</b> | <b>£346,000</b> |                 |

## Revenue Spend

The operating loss is highest at Strathearn Community Campus at £244k in 2022/23. This venue also had an income of £313k. The community halls also made an operating loss with Aytoun Hall being the most significant at £69k. Strathearn an Dunning Town Hall also have a considerable amount of investment required for maintenance over the next five years of £766k and £176k respectively.

| Venue                              | Income 2022/23  | Operating loss/surplus 2022/23 | LAL Overheads 2022/23 | Subsidy Per Head | Capital (5 Yrs)   |
|------------------------------------|-----------------|--------------------------------|-----------------------|------------------|-------------------|
| <b>Strathearn Community Campus</b> | £313,557        | *£244,782                      | £82,053               | £2.44            | £766,514          |
| <b>Total (LAL Venues)</b>          | <b>£313,557</b> | <b>£244,782</b>                | <b>£82,053</b>        |                  | <b>£766,514</b>   |
| <b>Aytoun Hall</b>                 | £23,495         | £69,332                        |                       | £5.06            | £78,510           |
| <b>Dunning Town Hall</b>           | £2,838          | £14,453                        |                       | £4.47            | £176,803          |
| <b>Blackford Community Hall</b>    | £3,066          | £12,372                        |                       | £4.68            | £5,712            |
| <b>Total (Halls)</b>               | <b>£29,399</b>  | <b>£96,157</b>                 |                       |                  | <b>£255,313</b>   |
| <b>Grand Total</b>                 | <b>£342,956</b> | <b>£340,939</b>                | <b>£82,053</b>        |                  | <b>£1,021,827</b> |

\*Include LAL Overhead Charges, \*\* Includes an apportionment of school operating costs, Red denotes Loss, Black denotes surplus

## Environmental Footprint

| Asset                       | Current Emissions <sup>7</sup> | 5 Year Energy Costs <sup>8</sup> | Indicative Capital Investment | Payback |
|-----------------------------|--------------------------------|----------------------------------|-------------------------------|---------|
| Strathearn Community Campus | 337                            | £1,013,874                       | n/a                           | n/a     |
| <b>Total</b>                | <b>337</b>                     | <b>£1,013,874</b>                |                               |         |

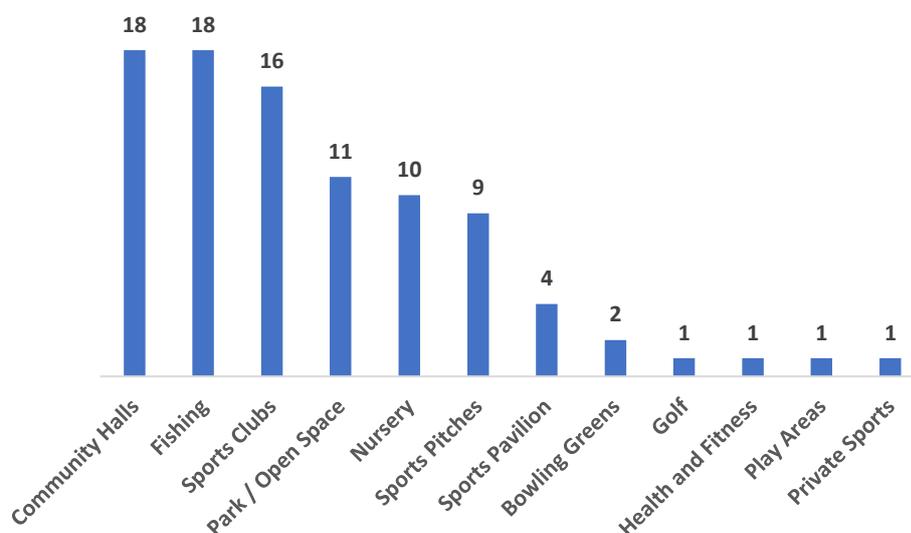
\*This reflects the energy costs for the whole facility and not apportioned for sports and leisure provision

## Strathtay

### Current Provision

There are no PKC funded venues within the Strathtay locality other than 9 primary schools, none of which are currently used for community sport and leisure activities. However, some of the Strathtay population are within reasonable reach of Perth City and Blairgowrie sports and leisure venues.

### Other Sport and Physical Activity Assets



## Population

The National Records of Scotland (NRS), estimate the population of the Strathtay to be close to 12,800 residents. The NRS anticipates a small increase of approximately 140 within the eight-year span from 2022 to 2030. Furthermore, in light of planned housing developments, an additional population growth of 3,800 residents is projected to occur by the year 2034. Most of this development is planned for land

<sup>7</sup> Tonnes of CO<sup>2</sup>. This Includes Scope 1,2 and 3 Emissions. For context a tonne of CO<sub>2</sub> is equivalent to 3,300 km driven in a petrol car, one passenger flight from Paris to New York, or 121,600 smartphones charged.

<sup>8</sup> Based on current prices

close to Perth City. This increase will create additional demand for sport and physical activities within the existing infrastructure.

### Accessibility

| Travel time | Travel mode                                                                       | Swimming Pool | Sportshall | Fitness Gym | Group Fitness |
|-------------|-----------------------------------------------------------------------------------|---------------|------------|-------------|---------------|
| 20 Minutes  |  | 22%           | 68%        | 52%         | 52%           |
| 20 Minutes  |  | 0%            | 0%         | 0%          | 0%            |

This table shows the % of the locality population that can access sports and physical activity assets within 20 minutes traveling at Peak times

## Perth And Kinross Council

22 January 2024

### LEARNING ESTATE

#### Report by Strategic Lead, Property Services and Executive Director (Education and Children's Services)

(Report No. 24/20)

#### 1. PURPOSE

1.1 As requested at the meeting of Learning and Families Committee on 2 November 2022 ([Report No. 22/263](#)) and the meeting of Perth and Kinross Council on 1 March 2023 ([Report No. 23/73](#)), the purpose of this report is to provide an update on the work undertaken to review the Learning Estate.

1.2 The report considers the following:

- The feasibility of introducing Early Learning and Childcare (ELC) provision in all rural primary schools currently without one;
- Perth and Kinross wide catchment analysis that seeks to utilise available capacity to ensure all current schools have a sustainable future roll; and
- Review of secondary learning estate in Perth City.

#### 2. RECOMMENDATIONS

2.1 It is recommended that Council:

- i. Agrees with the recommendation of no further action following the outcome of the feasibility of introducing Early Learning and Childcare provision in all rural primary schools currently without one as there are no solutions that would help to generate a sustainable school roll.
- ii. Agrees with the recommendation of no further action following the outcome of the work undertaken on catchment analysis that seeks to utilise available capacity in low occupancy primary schools as there are no solutions that would help to generate a sustainable school roll.
- iii. Instructs the Director, Strategy, People and Resources to commence community engagement to seek the views of stakeholders and communities regarding the vision and future of the secondary learning estate in Perth City.
- iv. Notes that a review is underway relating to the timing of a new primary school at Bertha Park.

### **3. STRUCTURE OF REPORT**

3.1 This report is structured over the following sections:

- Section 4: Background
- Section 5: Early Learning and Childcare (ELC)
- Section 6: Primary School Catchment Analysis
- Section 7: Secondary Learning Estate
- Appendices

### **4. BACKGROUND**

4.1 The Learning Estate Strategy was agreed at Lifelong Learning Committee on 3 November 2021 ([Report No. 21/202](#)).

- It aligns with and complements the Council's approved Investment Blueprint and 30-year Investment Plan.
- It identified actions that are being taken forward through the Learning Estate Management Plan which partners the strategy.

4.2 As requested at the meeting of Perth and Kinross Council on 1 March 2023 ([Report No. 23/73](#)), this review will now be incorporated into the work on developing the Council's Corporate Asset Management Framework. This paper is presented as an earlier agenda item at Committee today.

4.3 It is essential in moving forward to complement the Corporate Asset Management Framework. Appendix 1 shows how the Learning Estate Strategy currently sits within the wider corporate estate, this will be reviewed following adoption of the Council's operating model and proposed Corporate Asset Management Framework.

4.4 The review in this part of the report considers the following:

- The feasibility of introducing Early Learning and Childcare provision in all rural primary schools currently without one;
- 'A Perth & Kinross wide catchment analysis that considers the projected population expansion as a consequence of current and projected new housebuilding and seeks to utilise available capacity to ensure all current schools have a sustainable future roll'; and
- A review of secondary learning estate in Perth City.

### **5. EARLY LEARNING AND CHILDCARE (ELC)**

5.1 This section considers the feasibility of introducing Early Learning and Childcare in all rural primary schools currently without one.

## ELC Background Information

5.2 There are 11 ELC communities within Perth and Kinross. Each of these communities has access to a mix of attendance options at local authority, funded provider setting and childminders offering flexibility of choice within the private, voluntary and independent sector. The offering is detailed on the Perth and Kinross Council website link below:

<https://www.pkc.gov.uk/article/22938/Nursery-locality-and-attendance-patterns>

5.3 Funded provider settings include private nurseries, playgroups, nursery classes and childminders within the private, voluntary and independent sectors.

5.4 The ELC provision within Perth and Kinross consists of:

- 49 local authority nursery settings operating within our primary schools.
- 46 funded provider settings offering funded ELC.
- There are 19 rural primary schools that do not have nursery provision onsite.

5.5 Major housebuilding is underway within the catchment area of Ruthvenfield Primary School and Pitcairn Primary School. A new primary school within this area is planned which will include nursery provision. It is considered that the impact of housebuilding, as identified in the Local Development Plan, on the remaining rural primary schools identified can be accommodated.

5.6 Local Authorities have a statutory duty to consult every two years on the provision of ELC to inform the planning and delivery of services. Additional engagement was undertaken in 2022 to further understand the uptake of ELC models and also to understand overall parent satisfaction with the expansion to ELC within Perth and Kinross. This additional consultation indicated that most parents are satisfied with the offer within Perth and Kinross. More than 90% of families received their first choice of model in phase one, with the offer of an alternative accepted by most of those who did not receive their first choice.

5.7 The consultation reports are available from the links below:

[Early learning and childcare consultation 2021 - Perth & Kinross Council Citizen Space - Citizen Space \(pkc.gov.uk\)](#)

[1140 hours - Early Learning & Childcare Consultation - Perth & Kinross Council Citizen Space - Citizen Space \(pkc.gov.uk\).](#)

5.8 The latest consultation is due to be undertaken by March with results published later in 2024. This data is used to support further planning and improvement in this area.

- 5.9 As part of the 1140 hours programme a strategy was developed for the delivery of nursery education ([Report No. 21/134](#)). The Council has recently invested £17.5m as part of 1140 hours expansion programme and as a result Perth and Kinross Council have planned for sufficient Early Learning and Childcare places to meet their statutory duty to provide 1140 hours of ELC for all 3 and 4 year olds and eligible 2 year olds. Each year when applications for places in Local Authority ELC settings close in April, the Early Years team work to ensure that children gain one of their 3 choices. This is achieved across all ELC communities by reviewing capacities and staffing allocations annually in readiness for the new session starting in August.
- 5.10 There is currently no funding allocated to undertake ELC expansion related works in the 19 rural primary schools.
- 5.11 There is currently no requirement placed on Local Authorities to provide other forms of childcare. PKC await further guidance on the Scottish Government's Programme for Government with reference to the expansion of ELC for 2 year olds and provision for 1 year olds, along with the expansion of school aged childcare and Wraparound Care.

#### **Rural Schools without nursery provision on site**

- 5.12 An analysis has been carried out on each of the rural schools that do not have nursery provision on site. This provided information in terms of ELC provision within the ELC community. Details of the analysis is provided in Appendix 2. The analysis considered ELC provision in the area and community and whether there was a current requirement for additional nursery places. When considering this, the Council need to be mindful of the impact on business sustainability of funded providers.
- 5.13 The outcome of the analysis identified:
- There is sufficient capacity and sufficient partner providers in the ELC nursery communities identified currently.
  - There is no demand led need for additional nursery provision in the 19 rural primary schools.
- 5.14 Provision of Early Learning and Childcare across Perth and Kinross is reviewed annually as part of the ELC application process and staffing exercises to ensure there is sufficient capacity within each ELC community for all eligible children.

#### **Recommendation to Council**

- 5.15 Based on the above factors no further action following the outcome of the feasibility of introducing Early Learning and Childcare provision in all rural primary schools currently without one as there are no solutions that would help to generate a sustainable school roll.

5.16 We will continually review capacity and vary our planning if, and when needed.

## **6. PRIMARY SCHOOL CATCHMENT ANALYSIS**

6.1 This section considers the Perth and Kinross wide catchment analysis that seeks to utilise available primary capacity to ensure all schools have a sustainable future roll.

6.2 Based on most recent approved Census, 19 primary schools have an occupancy of under 60% based on the planning capacity of the school.

6.3 The 19 primary schools are:

- Abernethy Primary
- Abernyte Primary
- Alyth Primary
- Breadalbane Academy (Primary)
- Collace Primary
- Coupar Angus Primary
- Errol Primary
- Glendelvine Primary
- Glenlyon Primary
- Guildtown Primary
- Invergowrie Primary
- Kenmore Primary
- Kinloch Rannoch Primary
- Logiealmond Primary
- Logierait Primary
- Meigle Primary
- Royal School of Dunkeld
- St. Ninian's Episcopal Primary
- Stanley Primary

6.4 See Appendix 3 for further details on the occupancy levels.

### **School Catchment – Background**

6.5 Education Authorities have a statutory duty in terms of the Education (Scotland) Act 1980 to make adequate and efficient provision of school education across their area. This duty applies in respect of both the current school population and future pattern of demand.

6.6 All primary and secondary schools have agreed catchment areas. Any proposed changes to catchments areas are required to be considered under the process of the Schools (Consultation) (Scotland) Act 2010.

6.7 Generally, catchment areas are not changed unless there is a specific requirement to do so, such as new additional schools where significant housebuilding is planned or school closures.

- 6.8 It should be noted any change in school catchment should be evidence based and should be underpinned by an educational benefits statement.
- 6.9 Proposed housebuilding within Perth and Kinross is detailed in the Local Development Plan (LDP) and collaborative work across the Council is undertaken to continually monitor the effects of housebuilding. The larger density of housing developments tends to be urban.
- 6.10 Approx 93% of current primary pupils live within the statutory walking distance of their catchment school.

### **Work Undertaken**

- 6.11 An exercise has been undertaken looking at each of the 19 schools identified. Examples of the considerations are:
- Transport – Is there a requirement to transport children who would previously have been within statutory walking distance of their catchment school?
  - School rolls – Is there a positive or negative impact on the school rolls of identified neighbouring schools?
  - Neighbouring schools – Are there nearby neighbouring schools that could reasonably be considered?
  - Catchment boundaries – would pupils need to cross another school catchment area?
- 6.12 From the work undertaken to date:
- The analysis of the 19 schools using the above considerations showed that there were no identified solutions involving catchment change that could improve the situation without a level of detriment. This is due to several factors such as no neighbouring schools with roll pressures, lack of actual pupil numbers living in the school catchments and travel distances to more populated areas.
  - When actual utilisation of classroom space is analysed alongside planning capacity, in some schools there is less available space than initially perceived i.e., a 2-classroom school has an occupancy level of 55% but is using both classrooms due to staffing/pupil ratios.
- 6.13 Major housebuilding has been ongoing within the catchment area of Ruthvenfield Primary School and Pitcairn Primary School. A new primary school within this area is planned which will include nursery provision.
- 6.14 On 2 November 2022, Learning and Families Committee approved the catchment for a new primary school at Bertha Park, with a target completion date of August 2026 for it. ([Report No. 22/265](#)).

- 6.15 We continue to analyse house building data in the catchment area detailing the pupil product numbers generated from the new housing at Bertha Park. Given recent economic slowdown in house building and the localised pupil numbers to date, a review of the timescales associated with the need for a new primary school in this area is being undertaken. The outcomes from that will be reported to the Finance & Resources Committee.

### **Recommendations to Council**

- 6.16 Based on the work undertaken, no further action is recommended following the outcome of the work undertaken on catchment analysis, that seeks to utilise available capacity in low occupancy primary schools as there are no solutions that would help to generate a sustainable school roll.
- 6.17 Notes that a review is underway relating to the timing of a new primary school at Bertha Park.

## **7. SECONDARY LEARNING ESTATE**

- 7.1 This section considers the review of the secondary Learning Estate in Perth City following instruction at the meeting of full Council March 1 2023.

### **Key Drivers**

- 7.2 The Learning Estate Management Plan (LEMP) details that the Council will undertake a review of the secondary Learning Estate in Perth City.
- 7.3 The LEMP noted the occupancy in the Perth City secondary learning estate needs rebalanced after the opening of Bertha Park High School.
- 7.4 Consideration also needs to be given to the investment required within the secondary learning estate in Perth City. The current position is as follows:

| <b>School</b>           | <b>Capacity</b> | <b>Roll</b> | <b>Condition</b> | <b>Suitability</b> | <b>Current Approved Investment (2023/2028)</b> |
|-------------------------|-----------------|-------------|------------------|--------------------|------------------------------------------------|
| Bertha Park High School | 1100            | 645         | A                | A                  | n/a                                            |
| Perth Academy           | 1218            | 1011        | B                | C                  | £8.1m                                          |
| Perth Grammar School    | 1182            | 728         | B                | C                  | £4.9m                                          |
| Perth High School       | 1546            | 1487        | B                | C                  | £80.2m                                         |
| St John's RC Academy    | 838             | 641         | B                | A                  | n/a                                            |
| <b>Total</b>            | <b>5884</b>     | <b>4512</b> | <b>-</b>         | <b>-</b>           | <b>£93.2m</b>                                  |

## **Review Considerations**

- 7.5 The review will consider how best to:
- Ensure the secondary learning estate in Perth City is well aligned with service need and corporate estate priorities.
  - Improve operational efficiency of school/community facilities.
  - Consider compliance with statutory carbon emission reduction targets.
  - Consider future requirement for investment in multiple buildings.
- 7.6 It should be noted that St. John's RC Academy is out-with the scope of the review due to its denominational status.

## **Key Influences**

- 7.7 The following are factors that will influence the review process:
- LDP3
  - Road networks via the new CTRL
  - One public estate and leisure assets review
  - ASN provision
  - Transport
  - Transition arrangements

## **Community Engagement**

- 7.8 Undertaking informal engagement, or consultation, before a proposal is fully developed is recommended in the Statutory Guidance on the Schools (Consultation) (Scotland) Act 2010. The process can assist communities to understand and help shape proposals that affect them. The feedback provided to Council can provide valuable information to inform further consideration of proposals.
- 7.9 It is therefore proposed that the views of key stakeholders are sought in considering the future of the secondary learning estate in Perth City in the longer term. These stakeholders will include pupils, parents, staff, communities and other partners as appropriate. Should council permission be granted for the review a strategic working group will be formed to set out the engagement approach.

## **Next Steps**

- 7.10 The following work would require to be undertaken:
- Analysis of roll projections.
  - Consider secondary catchments.
  - What are the viable options that could be explored further?
  - Undertake engagement with stakeholders which will include pupils, parents, staff, communities and other partners as appropriate.

## Recommendation

- 7.11 It is recommended to commence a community engagement exercise with all relevant stakeholders regarding the vision and future of the secondary learning estate in Perth City.

### Authors

| Name             | Designation                          | Contact Details                                                |
|------------------|--------------------------------------|----------------------------------------------------------------|
| Stephen Crawford | Strategic Lead, Property Services    | <a href="mailto:scrawford@pkc.gov.uk">scrawford@pkc.gov.uk</a> |
| Brian Reid       | Service Manager, Resource Management | <a href="mailto:breid@pkc.gov.uk">breid@pkc.gov.uk</a>         |

### Approved

| Name         | Designation                            | Date             |
|--------------|----------------------------------------|------------------|
| Clare Mailer | Director, Strategy, People & Resources | 13 December 2023 |

## APPENDICES

Appendix 1 – Learning Estate Strategy Flowchart.

Appendix 2 – High Level Analysis – Rural Primary Schools that do not have nursery provision on site.

Appendix 3 – Primary Schools – Under 60% Occupancy.

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You can also send us a text message on 07824 498145.

All Council Services can offer a telephone translation facility.

## 1. IMPLICATIONS, ASSESSMENTS, CONSULTATION AND COMMUNICATION

| <b>Strategic Implications</b>                       | <b>Yes/None</b> |
|-----------------------------------------------------|-----------------|
| Community Plan/Single Outcome Agreement             | <b>None</b>     |
| Corporate Plan                                      | <b>None</b>     |
| <b>Resource Implications</b>                        |                 |
| Financial                                           | <b>None</b>     |
| Workforce                                           | <b>None</b>     |
| Asset Management (land, property, IST)              | <b>Yes</b>      |
| <b>Assessments</b>                                  |                 |
| Equality Impact Assessment                          | <b>Yes</b>      |
| Strategic Environmental Assessment                  | <b>Yes</b>      |
| Sustainability (community, economic, environmental) | <b>Yes</b>      |
| Legal and Governance                                | <b>Yes</b>      |
| Risk                                                | <b>None</b>     |
| <b>Consultation</b>                                 |                 |
| Internal                                            | <b>Yes</b>      |
| External                                            | <b>None</b>     |
| <b>Communication</b>                                |                 |
| Communications Plan                                 | <b>None</b>     |

### 1. Strategic Implications

#### Community Plan/Single Outcome Agreement

1.1 N/A.

#### Corporate Plan

1.2 N/A.

### 2. Resource Implications

#### Financial

2.1 N/A.

#### Workforce

2.2 N/A.

#### Asset Management (land, property, IT)

2.3 There are no direct asset management implications arising from this report other than those reported within the body of the main report.

### 3. Assessments

#### Equality Impact Assessment

- 3.1 Under the Equality Act 2010, the Council is required to eliminate discrimination, advance equality of opportunity, and foster good relations between equality groups. Carrying out Equality Impact Assessments for plans and policies allows the Council to demonstrate that it is meeting these duties.
- 3.2 The proposals contained within this report have been considered under the Corporate Equalities Impact Assessment process (EqIA) and has been assessed as **not relevant** for the purposes of EqIA.

#### Strategic Environmental Assessment

- 3.3 The Environmental Assessment (Scotland) Act 2005 places a duty on the Council to identify and assess the environmental consequences of its proposals.
- 3.4 The proposals contained within this report has been considered under the Act. However, no action is required as the Act does not apply to the matters presented in this report.

#### Sustainability

- 3.5 Under the provisions of the Local Government in Scotland Act 2003, the Council has to discharge its duties in a way which contributes to the achievement of sustainable development. In terms of the Climate Change (Scotland) Act 2009 the Council has a general duty to demonstrate its commitment to sustainability and the community, environmental and economic impacts of its actions.
- 3.6 The information contained within this report has been considered under the Act. However, no action is required as the Act does not apply to the matters presented in this report.

#### Legal and Governance

- 3.7 The Strategic Lead, Legal and Governance has been consulted in the preparation of this report.

### 4. Consultation

#### Internal

- 4.1 The Executive Leadership Team have been consulted in the preparation of this report.

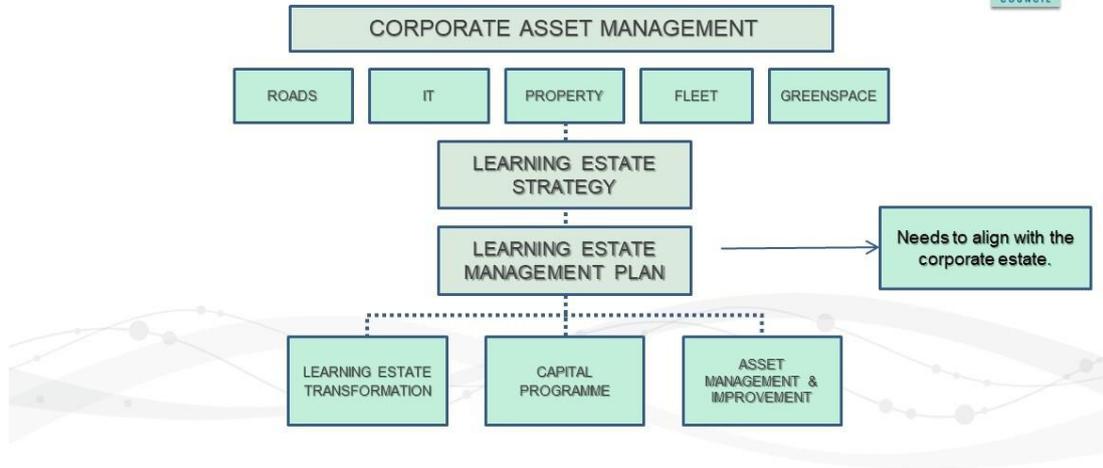
**5. Communication**

5.1 N/A.

**2. BACKGROUND PAPERS**

2.1 No background papers, as defined by Section 50D of the Local Government (Scotland) Act 1973 (and not containing confidential or exempt information) were relied on to a material extent in preparing the above report:

### Learning Estate Strategy Flowchart



Improving Lives Together | Ambition | Compassion | Integrity



**High Level Analysis**  
**Rural Primary Schools that do not have nursery provision on site**

| <b>Primary School</b> | <b>Nursery Community Cluster</b> | <b>Partner Provider in Area</b> | <b>Existing nursery capacity within community</b> | <b>Requirement for additional nursery places</b> |
|-----------------------|----------------------------------|---------------------------------|---------------------------------------------------|--------------------------------------------------|
| Abernyte              | Carse of Gowrie                  | Y                               | Y                                                 | N                                                |
| Aberuthven            | Auchterarder                     | Y                               | Y                                                 | N                                                |
| Blackford             | Auchterarder                     | Y                               | Y                                                 | N                                                |
| Burrelton             | Blairgowrie                      | Y                               | Y                                                 | N                                                |
| Cleish                | Kinross                          | Y                               | Y                                                 | N                                                |
| Collace               | Scone                            | Y                               | Y                                                 | N                                                |
| Dunning               | Auchterarder                     | Y                               | Y                                                 | N                                                |
| Forgandenny           | South Perth & Earn               | Y                               | Y                                                 | N                                                |
| Glendelvine           | Strathtay                        | Y                               | Y                                                 | N                                                |
| Grandtully            | Aberfeldy                        | Y                               | Y                                                 | N                                                |
| Kenmore               | Aberfeldy                        | Y                               | Y                                                 | N                                                |
| Kettins               | Blairgowrie                      | Y                               | Y                                                 | N                                                |
| Logiealmond           | Strathtay                        | Y                               | Y                                                 | N                                                |
| Madderty              | Crieff                           | Y                               | Y                                                 | N                                                |
| Meigle                | Blairgowrie                      | Y                               | Y                                                 | N                                                |
| Muthill               | Crieff                           | Y                               | Y                                                 | N                                                |
| Pitcairn              | Strathtay                        | Y                               | Y                                                 | N                                                |
| Portmoak              | Kinross                          | Y                               | Y                                                 | N                                                |
| Ruthvenfield          | North Perth                      | Y                               | Y                                                 | N                                                |



**Primary Schools – Under 60% Occupancy (based on planning capacity)  
As at Census 2022**

| <b>School</b>                   | <b>School Capacity</b> | <b>School Roll (minus ISP)</b> | <b>Occupancy</b> | <b>No. of classes the capacity is based on</b> |
|---------------------------------|------------------------|--------------------------------|------------------|------------------------------------------------|
| Abernethy Primary               | 283                    | 116                            | 41%              | 9                                              |
| Abernyte Primary                | 44                     | 24                             | 55%              | 2                                              |
| Alyth Primary                   | 283                    | 143                            | 51%              | 9                                              |
| Breadalbane Primary             | 302                    | 170                            | 56%              | 10                                             |
| Collace Primary                 | 49                     | 22                             | 45%              | 2                                              |
| Coupar Angus Primary            | 269                    | 146                            | 54%              | 9                                              |
| Errol Primary                   | 316                    | 159                            | 50%              | 10                                             |
| Glendelvine Primary             | 75                     | 33                             | 44%              | 3                                              |
| Glenlyon Primary                | 25                     | 7                              | 28%              | 1                                              |
| Guildtown Primary               | 46                     | 18                             | 39%              | 2                                              |
| Invergowrie Primary             | 283                    | 168                            | 59%              | 9                                              |
| Kenmore Primary                 | 75                     | 31                             | 41%              | 3                                              |
| Kinloch Rannoch Primary         | 50                     | 16                             | 32%              | 2                                              |
| Logiealmond Primary             | 48                     | 10                             | 21%              | 2                                              |
| Logierait Primary               | 50                     | 24                             | 48%              | 2                                              |
| Meigle Primary                  | 71                     | 38                             | 54%              | 3                                              |
| Royal School of Dunkeld Primary | 217                    | 125                            | 58%              | 7                                              |
| St. Ninian's Episcopal Primary  | 99                     | 58                             | 59%              | 4                                              |
| Stanley Primary                 | 217                    | 112                            | 52%              | 7                                              |



### **Affordable Housing Member / Officer Working Group**

It was agreed by Council on 21 December 2022 to re-establish the Affordable Housing Member/Officer Group for a period of 6-months with the following remit:

Remit:

- To provide strategic leadership and direction on the priorities and delivery of the Strategic Housing Investment Plan and all aspects of the provision of affordable housing in Perth & Kinross.
- To monitor the delivery of affordable housing targets (Council, RSL and private developers) and their effectiveness in meeting the key strategic priorities as agreed within the Local Housing Strategy.
- To consider the financial issues arising from the provision of affordable housing in relation to delivery, value for money and affordability to tenants.
- To respond to proposals, guidance and consultation papers on Housing and Planning regarding the provision of affordable housing.
- To consider best practice in the provision of affordable housing, focusing on experience in other parts of the UK and in the European community.

At the Housing and Social Wellbeing Committee on 29 November 2023 it was agreed that the Group should continue to meet as and when required to consider specific business on an ad hoc basis.

Council is asked to approve the proposal by the Committee.

