

Resources & Transformation Overview and Scrutiny Panel – 26 June 2025

Strategic Asset Management Plan

Purpose	For Decision
Classification	Public
Executive Summary	<p>This report introduces the council's Strategic Asset Management Plan 2025-28 ('SAMP'), Asset Disposal and Community Asset Transfer Policies.</p> <p>By reviewing the operating context both within and outside the Council, the SAMP sets out the main priorities and high-level actions by which the Council intends to manage its property assets over a 3-year period.</p> <p>The aim of the SAMP is to enable the council to review its property assets to better pursue its corporate goals, which may enable existing sites to be repurposed for other priorities.</p> <p>It will also allow us to focus on Best Value in relation to property – through aspects such as improving occupancy of our service buildings and optimising the income received through our leased estate.</p> <p>The New Forest District Council Strategic Asset Management Plan 2025-28, Disposal Policy and Community Asset Transfer Policy are appended in full at the end of this report.</p>
Recommendation(s)	<p>The panel are asked to give feedback to the Cabinet, ahead of their consideration of the following recommendations:</p> <p>It is recommended that Cabinet recommend Council approve:</p> <p>1. the Strategic Asset Management Plan 2025-28 ('SAMP') and the high-level actions which flow from the Plan.</p>

	<p>2. the Asset Disposal Policy.</p> <p>3. the Community Asset Transfer policy.</p> <p>4. the re-direction of the £1.5 million Corporate Priorities reserve to support the delivery of the SAMP, resulting in the full budget equalisation reserve being available to support budget preparation over the medium term period.</p> <p>5. the approval of a delegation to the Strategic Director Corporate Resources and Transformation to drawdown the Corporate Priorities reserve for the purposes of SAMP delivery, in consultation with the Portfolio Holder for Corporate Resources.</p> <p>6. the approval of a delegation to the Chief Executive and Strategic Director Corporate Resources and Transformation in their positions as Transformation Board members, to take decisions in accordance with the Governance arrangements as set out in the SAMP and associated policies.</p>
Reasons for recommendation(s)	<p>The Strategic Asset Management Plan allows the Council to set out longer-term goals in respect of its property assets, thereby aligning property to key corporate priorities. The development of the plan also aligns with the recommendations of the Corporate Peer Challenge report (December 2024) and supports the preparedness for Local Government Reorganisation (LGR).</p> <p>This plan is closely aligned to the strategic objectives within the corporate plan, transformation strategy, customer strategy and people strategy.</p>
Ward(s)	All
Portfolio Holder(s)	Councillor Jeremy Heron – Portfolio Holder for Finance and Corporate

Strategic Director(s)	Alan Bethune – Corporate Resources & Transformation
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Introduction and background

1. It is recognised good practice for local authorities to produce a Strategic Asset Management Plan setting out their broad objectives for the management, development and rationalisation of their built and land asset base over a three-to-five-year period. The recent Corporate Peer Challenge also made recommendations as to the establishment of a Strategic Asset Management Plan and action plan. Due to ongoing discussions in relation to devolution and local government reorganisation this SAMP covers a three-year period.
2. A Strategic Asset Management Plan (SAMP) sets out what the council intends to do in the future to ensure property assets support corporate priorities.
3. The challenge facing all local authorities is that we must continue to deliver effective services with ever decreasing resources and competing demands. The financial constraints and uncertainty in the wider economy bring additional challenges. In this context, it is essential that we take a strategic view of our asset portfolio to deliver our corporate priorities and achieve the best value for money possible from our assets.
4. Effective asset management is a key element of Future New Forest, the Council's transformation strategy and is vital for achieving the council's strategic priorities and driving service improvements, with asset rationalisation playing a key role in reducing costs and enhancing efficiency. The strategic deployment of land and property assets supports core objectives such as maintaining a clean and welcoming environment, empowering neighbourhoods, and fostering economic growth through inward investment and job creation. Given the high capital and operational costs associated with property assets, a structured asset management approach is essential to ensure value for money through optimal use, maintenance, and income generation over the asset lifecycle.
5. The SAMP covers General Fund assets (non-housing stock) and not those contained within the ring-fenced Housing Revenue Account.

6. The new Strategic Asset Management Plan (Appendix 1) is a suite of living documents, divided into three clear parts that can be updated separately to remain relevant. The framework is made up of 3 core sections;



7. The Strategic Asset Management Plan 2025-2028 centres around the delivery of five pillars with interlinked objectives and will provide an overview of our land and property estate (excluding housing).

These are:

a. Digital Asset Management

- i. To create an effective digital asset management database enabling the capture of accurate management information, in support of ensuring statutory and regulatory compliance is upheld across the estate.
- ii. To Embed a culture that recognises that property assets are a key corporate resource, where informed decisions are made that are linked to corporate and service objectives that deliver good financial sustainability and service outcomes.

b. Asset Optimisation in Support of Corporate Plan Priorities

- i. To optimise the estate to generate operating savings, ensure assets are fit for purpose, meet service operating and user needs, incorporate technological advances and minimise whole life building costs.
- ii. To ensure ownership and occupation of assets is robustly challenged.

c. Working with Partners and Communities to Promote Efficient and Effective Service Delivery

- i. To enable transfer of management / ownership of the asset where it can provide a benefit to service delivery and demonstrate longer term benefit.
- ii. Maximise efficient use of our assets through collaborative working with partners.

d. To Reduce the Environmental Impact of Council Assets

- i. Champion reduction in the Environmental impact of occupation, use, travel and waste.

e. To Support Economic Growth, Regeneration and Prosperity

- i. We will manage our commercial portfolio effectively, balancing regeneration needs, job creation and income generation.
- ii. We will work with key partners to support our business base and economic centres to thrive and grow.

Estate Overview

- 8. Property assets play a critical 'enabling' role within the Council: accommodating services; underpinning our finances; and supporting our wider aims of local economic and social development.
- 9. In relation to the General Fund New Forest District Council owns over 366 separately listed non-dwelling building and land assets covering a combined 770 hectares. With a book value of over £107.4M and an annual holistic running costs of £4.9M.
- 10. Property holdings range from administrative office buildings, operational buildings situated in the community (such as community halls and public conveniences) and more complex operational sites (such as depots). They are held on a mixture of tenures, freehold (predominantly) and leasehold.
- 11. They can be summarised in the following categories;
 - a. 14 Investment properties
 - b. 148 Non-operational Assets
 - c. 204 Operational Assets

Implementation

12. The SAMP includes sections under the heading of 'Asset Management Action Plan'. These sections set out the high-level roadmap actions which will be required to implement the SAMP. Each of the strategic pillars has clear objectives and an annual action delivery plan for the 3-year period. The Estates, Valuation and Facilities department will lead on these, in partnership with services.
13. Following adoption of the SAMP, these will be further developed by the Estates, Valuation and Facilities department into a detailed 'Living Action Plan'. This action planning will ultimately be integrated into the work programmes of the corporate property services – Facilities Management, Asset Management, and Capital Delivery – as appropriate.
14. As part of the above, an Asset Review project will be undertaken, including a risk based five-yearly asset condition survey which will then guide a future phase in terms of deciding which assets to retain, which to make further investment in, and which to repurpose for other uses, as part of the Asset Challenge Framework included within the SAMP.
15. Aligned to the action plan understanding the condition of our assets will be prioritised, along with specific investment to ensure the longevity of key community facilities. Opportunities for open space transfer to support sport and recreation will also be prioritised.

Governance

16. The Council recognises that good governance is a key component of this strategy, so it is essential that all decisions to dispose of or acquire an asset must be subject to clear governance process.
17. The SAMP provides clear governance guidelines for
 - a. Asset disposal
 - b. Community Asset Transfer
18. Each governance process has clear owners and defined roles and responsibilities to progress matters and attain necessary approvals. Further details are contained within the relevant respective policy documentations.
19. In the case of asset transfer or disposal specific delegation is given within the governance matrices to the Chief Executive and the Strategic Director (Corporate Resources and Transformation) through the Transformation Board. If the asset transfer meets the definition of a key decision, this will be progressed through a Council decision.

20. It also likely that when dealing with assets across such a broad Portfolio, a case-by-case basis will be required, and fluid decision making may be required from time-to-time. The Strategic Director for Corporate Resources and Transformation will ultimately oversee the process and will be required to use professional judgement where required in order deliver on the strategic actions.

Asset Disposal Policy

21. This policy (Appendix 2) sets out the core principles, procedures and governance to be applied when considering land or property for disposal. Whilst the primary focus of this document is to provide key policy guidance for officers, elected members, businesses and the general public, it is important to note that each individual case will be assessed on its own merits and nothing in this document binds the Council into any particular course of action when dealing with the portfolio.

Community Asset Transfer Policy

22. The principal aim of the Council's Community Asset Transfer Policy at Appendix 3 is to ensure the efficient use of assets through community empowerment and minimise costs through retention or transformation.
23. The policy identifies the process and tools for the Council to follow when it considers the transfer of its buildings or land to different forms of community ownership. It will ensure the Council can work in a consistent and transparent manner when/if embarking on a community asset transfer.
24. Finally, it establishes the nature of the organisations to which the Council will consider an asset transfer, the basis of the transfer and how requests will be processed.

Corporate plan priorities

25. The management of assets and accommodation is a key theme of Future New Forest, the council's transformation programme which underpins the delivery of the corporate plan priorities.

Options appraisal

26. The Council could choose not to adopt the Strategic Asset Management Plan. This would mean that our aims for our property assets are not explicitly articulated in council strategy and policy and long-term actions would be taken forward in a less coordinated fashion.

Consultation undertaken

27. The SAMP has been developed in consultation with EMT, the Transformation Board and the Finance and Corporate Resources Portfolio Holder.

Financial and resource implications

28. During the setting of the 2025/26 budget, the Council resolved;

'the principle of utilising up to £1.377 million of the budget equalisation reserve to fund investment in community assets, supporting the future transition to the new unitary authority and town and parish councils, is approved'.

29. To deliver on the actions within the SAMP and accompanying policies, funding will be required to ensure the right resource is in place to manage the programme, to finance required surveys, and works emanating from them.
30. The Council previously resolved the placement of £1.5m into the 'Corporate Priorities Reserve', there to fund the then planned works across Appletree Court (to facilitate third party letting of part of the building). As this project is no longer proceeding, it is now proposed that this Corporate Priorities reserves be used instead to support the delivery of the SAMP, enabling the budget equalisation reserve to be used for other purposes, to be explored further during the budget setting cycle.

Legal implications

31. The SAMP will support the Council to meet its statutory compliance and property management obligations and minimise the risk of harm to individuals as well as costs and reputational damage to the Council.
32. There will be legal implications arising as and when the Council looks to progress with any disposals. The Council's legal department will commission supplemental third-party expertise as required.

Risk assessment

33. None

Environmental / Climate and nature implications

34. Environmental implications are detailed within the body of the SAMP 2025-2028 document Appendix 1.

Equalities implications

35. There are no immediate equalities implications arising from the SAMP. Any new decisions, policies or plans flowing from the action plan will be reviewed for any equalities impacts.

Crime and disorder implications

36. There are no immediate equalities implications arising from the SAMP, although it is worth noting that the Council's deploys varying measures to ensure the security of its assets.

Data protection / Information governance / ICT implications

37. None

New Forest National Park implications

38. Some assets within the Council's Portfolio fall within the boundary of the National Park. The Council will always have due consideration to the purpose of the Parks Authority in the strategic management and review of its assets.

Appendices:

Appendix 1 – SAMP 2025-28

Appendix 2 – Asset Disposal Policy

Appendix 3 – Community Asset Transfer Policy

Background Papers:

Asset Investment Strategy