

Strategic Asset Management Plan

2025 - 2028

Estates and Valuation

June 2025

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Asset management

Executive summary

This Strategic Asset Management Plan 2025 – 2028 (SAMP) sets out what the council intends to do in the future to ensure property assets support corporate priorities.

Effective asset management is essential to meeting the council's priorities and improvement aims with asset rationalisation a key means of reducing costs and improving efficiency. Strategic use of land and property assets is a prerequisite for the achievement of key corporate priorities in relation to a clean and welcoming environment, supporting neighbourhoods and promoting inward investment and job creation.

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 portfolio, to deliver our corporate priorities and achieve the best value for money possible from all our assets.

The Strategic Asset Management Plan centres around the delivery of five pillars with interlinked objectives:

- Pillar 1: Digital asset management
- Pillar 2: Asset optimisation in support of corporate plan priorities
- Pillar 3: Working with partners and communities to promote efficient and effective service delivery
- Pillar 4: To reduce the environmental impact of council assets
- Pillar 5: To support economic growth, regeneration and prosperity.

In December 2024, the government published the **English Devolution White Paper**. This sets out plans to move power out of Westminster and back to local communities, ensuring that every part of England is covered by devolution.

We have been formally invited by the government to work with other councils in Hampshire and the Solent to develop a proposal for local government reorganisation (LGR). Taking this into account, the SAMP should be viewed as a key partner document for the LGR program in addition to our Corporate Plan 2024 - 2028. It also means we must be mindful of the LGR timeline, and the potential for key decision making of the Council to be somewhat restricted at some stage in the program.

Introduction

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

It is recognised good practice for local authorities to produce a SAMP 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. Due to ongoing discussions in relation to devolution and LGR this SAMP covers a three-year period, 2025 - 2028.

Asset management provides a structured process to ensure value for money from property in serving the needs of the organisation. Property assets are expensive, in terms of both their capital value and annual maintenance and running costs. They need to be carefully managed over their lives to ensure best value through their use, maintenance and generation of income.

The SAMP sets out the council's approach to the strategic management of its General Fund land and buildings, outlining how our assets support our strategic priorities. The document also identifies the action required to develop these priorities further and contains proposals for improving the effectiveness and efficiency of the Council's property portfolio.

Asset management framework

The SAMP is a suite of living documents, divided into three clear parts that can be updated separately to remain relevant.

To support this, the council has adopted a new asset management framework which has three core sections as follows:

1

The asset management strategy establishes:

- What the corporate approach or attitude is to property assets
- What we think our future should look like
- Where we want to be

2

The asset management action plan establishes:

- What we need to do to deliver our strategy
- The specific actions and prioritised focus areas

3

Policies and procedures

- To support delivery

Aims and approach

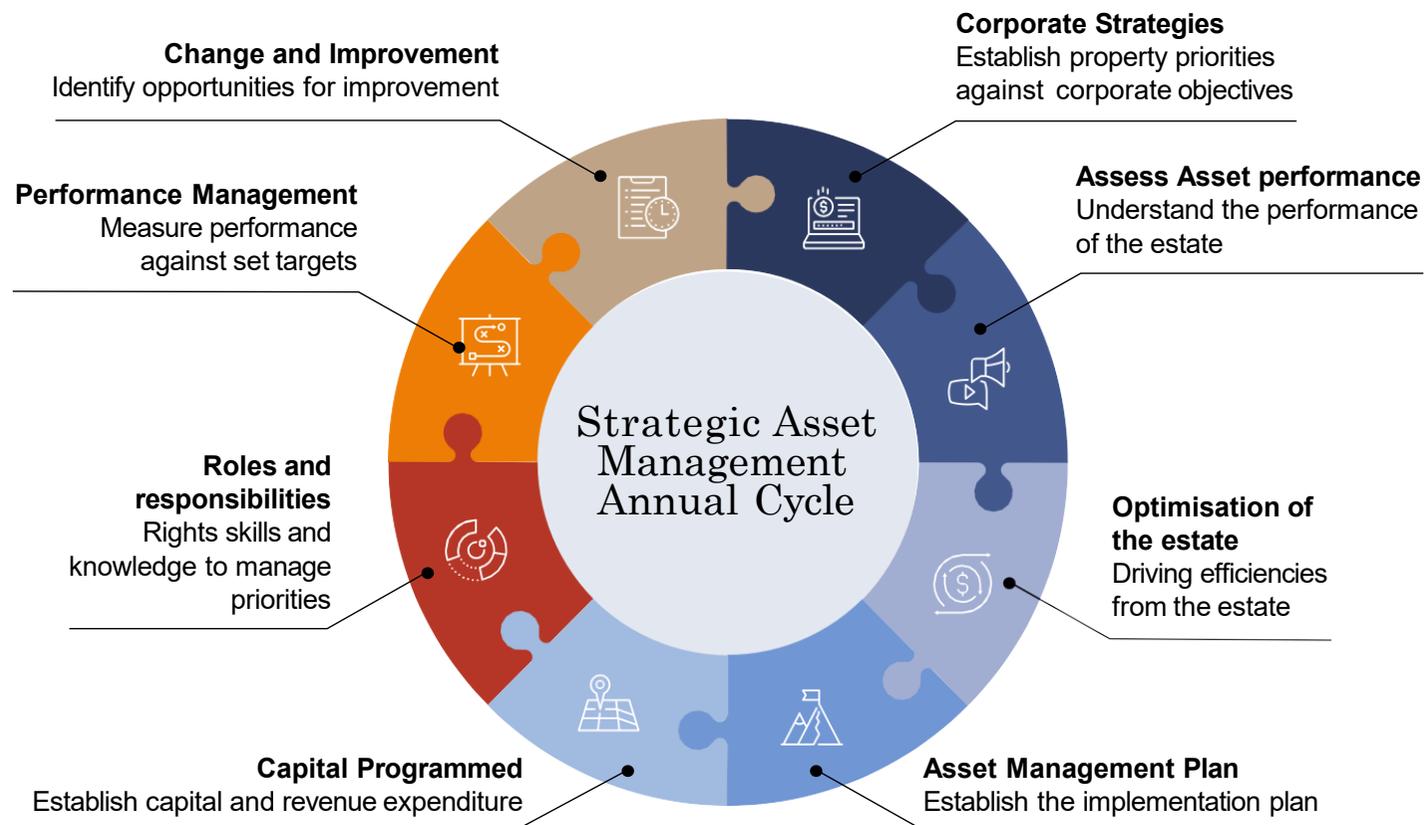
The aim of the SAMP, is to provide a framework for asset decision-making for the future use of our assets, enabling delivery to the organisation's way of working.

The document commits the council to managing its asset strategically.

In producing this SAMP, we will:

- Explain the framework in which the estate sits, including financial and portfolio summary
- Establish objectives for asset management
- Provide a programme of activity for the delivery of the objectives
- Set out a framework for an annual review of the 'state of the estate'

Review process cycle



Strategic pillars

The Strategic Asset Management Plan will provide an overview of our land and property estate (excluding Housing stock). Working within our five-pillar approach, we will focus areas for managing and developing the estate over the next three years. This will be supported by a suite of policies and procedures.

Effective management and ownership of a portfolio of assets will facilitate the future needs of the council services and functions within our financial means, whilst maximising opportunities for our residents, visitors and businesses.



SAMP objectives

The SAMP provides a framework within which we can secure the operational and financial benefits of an estate which aspires to standards of best practice.

The objectives of the SAMP are:

- Establishing a corporate framework for the management of all our non-housing property assets
- Highlight our corporate priorities that deliver the best outcomes
- Articulate a vision for Council land and property assets over the next three years
- Set out a strategic approach in respect of the Council's land and property assets so the portfolio is managed as a whole rather than considering assets in isolation
- Support longer term regeneration and growth by preparing business cases for retaining, acquiring or disposing of assets ensuring best consideration is achieved and where relevant community and social value is taken into consideration
- Develop an approach that maximises income and works across the New Forest District as One Public Estate for efficiencies
- Ensure that to meet services objectives and Community needs, we have the right assets in the right location, in good condition and efficiently managed.

Pillar objectives

In developing our strategic approach to our land and buildings, this policy includes certain actions and behaviours that we need to adopt, these are specific but also compliment the overall organisational values and behaviours.

1. Pillar one: Digital asset management

- 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.
- 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.

2. Pillar two: Asset optimisation in support of Corporate Plan priorities

- 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.
- To ensure ownership and occupation of assets is robustly challenged.

3. Pillar three: Working with partners and communities to promote efficient and effective service delivery

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

- Maximise the use of government available grants.
4. Pillar four: To reduce the environmental impact of council assets
- Champion reduction in the environmental impact of occupation, use, travel and waste.
 - Protect our climate, coast and natural world.
 - Promote the target for net zero carbon for the benefit of our residents.
 - Identify areas of support or grants from external private or public sources.
 - Eliminate or reduce the use of fossil fuel systems and seek to improve thermal efficiency across the estate
5. Pillar five: To support economic growth, regeneration and prosperity
- Support our business base and economic centres to thrive and grow.
 - Support economic growth and regeneration across NFDC.
 - Revitalise town centres through regeneration repurposing with a modern offering which fosters greater social interaction, community spirit, local identity and heritage.
 - We will manage our commercial portfolio effectively, balancing regeneration needs, job creation and income generation.

New Forest district context and Corporate Plan 2024 - 2028

About the New Forest district

The New Forest is the second most populated district authority in the southeast, with over 175,000 residents. It is home to the New Forest National Park which covers 75% of the land.

The New Forest is located within the county of Hampshire on the south coast of England positioned between Bournemouth, Wiltshire and Southampton. It is a vibrant and unique area known for its natural landscapes, ancient woodland, and 40 miles of stunning coastline.

The New Forest National Park area covers 566km² (219 sq. mi) of the central area of the district making it the largest contiguous area of unsovn vegetation in lowland Britain.

It is a working forest that has prospered for nearly 1,000 years. Many local practices are unique and date from historic times. This includes most significantly the depasturing of the iconic New Forest ponies, as well as cattle, pigs, and donkeys in the open forest by authorised landowners known as Commoners. These agricultural commoning practices are administered by the Verderers.



The largest settlements are Fordingbridge, Hythe, Lymington, Marchwood, New Milton, Ringwood, and Totton. Approximately 72% of residents live in urban areas, and 28% of residents live in rural areas.

It is home to an increasingly aging population with 30% of residents over the age of 65 compared to 19% nationally.

The average property price is just over £498,000 and around 74% of householders own their homes. Rental prices are high with the average monthly rent £125 higher than that for England.

Just over half of our residents of employment age are in full time employment.

30.4% of working people now state they work from home full time and around 2.2% of employment age residents claim unemployment benefit, representing a rise from previous years.

Around 30,100 people who live locally cross district boundaries to go to work with the main working areas being

- Southampton
- Bournemouth
- Test Valley

Approximately 22,500 workers travel inwardly from where they live to their employment within the district. Marine, hospitality and health and social care occupations make up some of the major industries.

Administrative occupations are the most common job type at 13.6%, Followed by corporate managers and directors at 12.0%, and customer service occupations make up 10.9%.

The area's largest employers include Exxon Mobil, Garmin, Paultons Park (home of Peppa Pig World), as well as public sector bodies including the NHS and us as the district council.

Demographics

175,785
residents living
within the district

Life expectancy is
83 years

51.9%
of residents are female
48.1%
of residents are male

96.8% of the population are White
1.3% of the population are Mixed Race
1.2% of the population are Asian or Asian British
0.4% of the population are Black or Black British
0.3% of the population are other ethnic groups

Average age in
New Forest is
51.8 years
Average age in
England is 40.

Median gross annual
earnings are
£34,647

The salary growth rate is
1.5% lower
than England

51.8% of residents are employed
33.4% of residents are retired
18% have a disability which limits their day-to-day activities by a little or a lot

Main language is
English

0.2% of residents reported having poor English language skills

We collect
Council Tax from
83,380 properties

4th largest economy in Hampshire
with £4.4 billion (GVA) generated in 2020
and circa 8,000 business enterprises

Data sourced from: NOMIS ONS 2021 census data, ONS Local statistics, 2019 Index of Multiple Deprivation, New Forest Economic Profile 2022.

Corporate Plan 2024 – 2028

To secure a better future by supporting opportunities for the people and communities we serve, protecting our unique and special place, and securing a vibrant and prosperous New Forest.

Our focus is on creating thriving and safe communities and a strong economy, providing homes, and supporting the most vulnerable, responding to the climate and nature emergency, and delivering excellent services that are future proof.

Our corporate plan priorities are designed to tackle these challenges head-on.

People

Helping people in the greatest need and creating balanced, resilient, and healthy communities who feel safe and supported with easy access to services

- Priority 1: Helping those in our community with the greatest
- Priority 2: Empowering our residents to live healthy, connected and fulfilling lives
- Priority 3: Meeting housing needs.

Place

Delivering growth, opportunity and services that shape our place now and for future generations, within a unique environmental context, to ensure we remain a special place to live, work and visit

- Priority 1: Shaping our place now and for future generations
- Priority 2: Protecting our climate, coast, and natural world
- Priority 3: Caring for our facilities, neighbourhoods and open spaces in a modern and responsive way.

Prosperity

Promoting a strong local economy that delivers its inclusive aspirations through effective partnerships, attracting investment, and increasing skills and employment opportunities

- Priority 1: Maximising the benefits of inclusive economic growth and investment
- Priority 2: Supporting our high-quality business base and economic centres to thrive and grow
- Priority 3: Championing skills and access to job opportunities.

Future New Forest

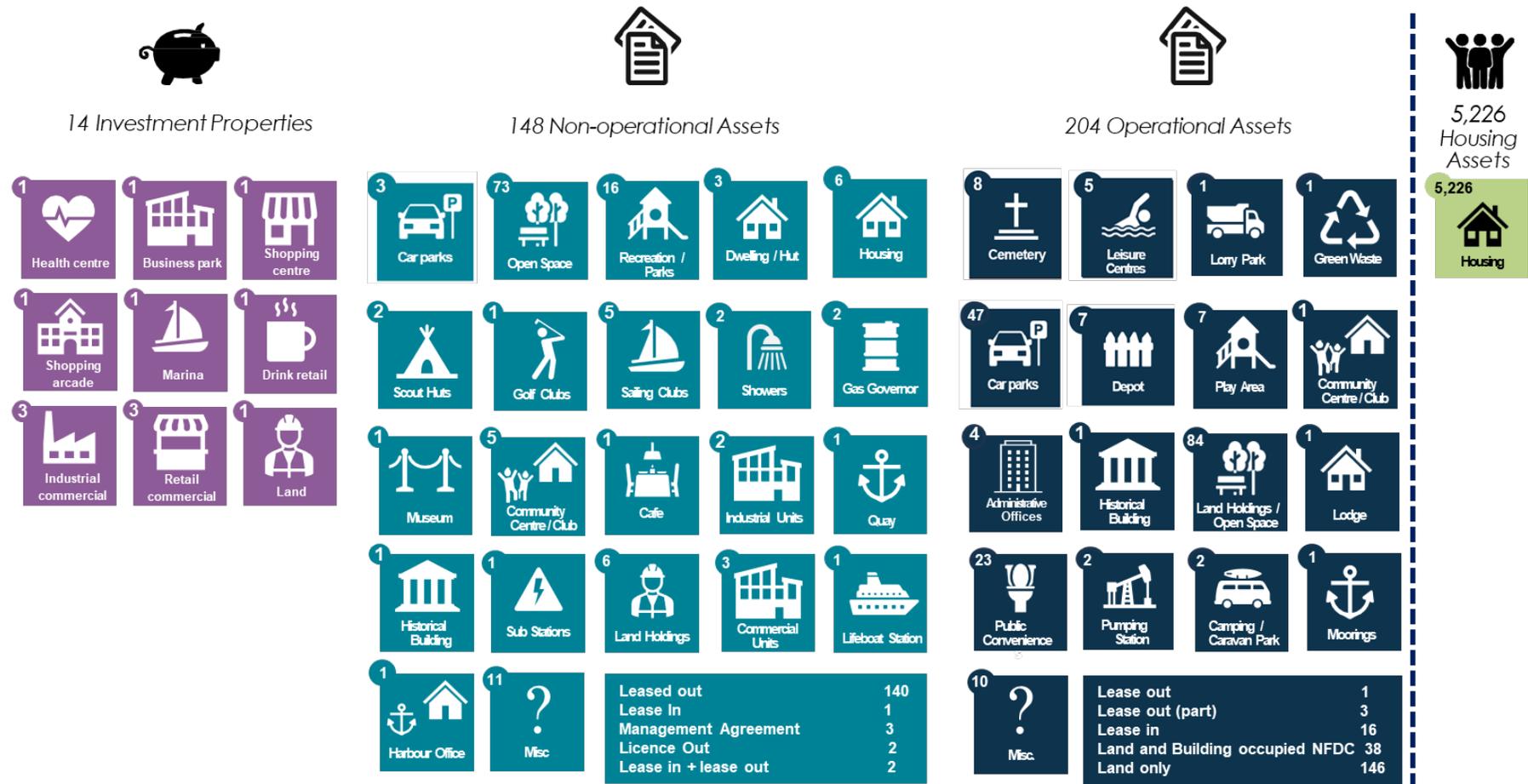
Underpinned by our transformation programme: Future New Forest. Investing in our people and services to meet customer needs, protecting the council's financial position, and embedding sustainability through our Future New Forest transformation programme.

- Priority 1: Putting our customers at the heart
- Priority 2: Being an employer of choice
- Priority 3: Being financially responsible
- Priority 4: Designing modern and innovative services.

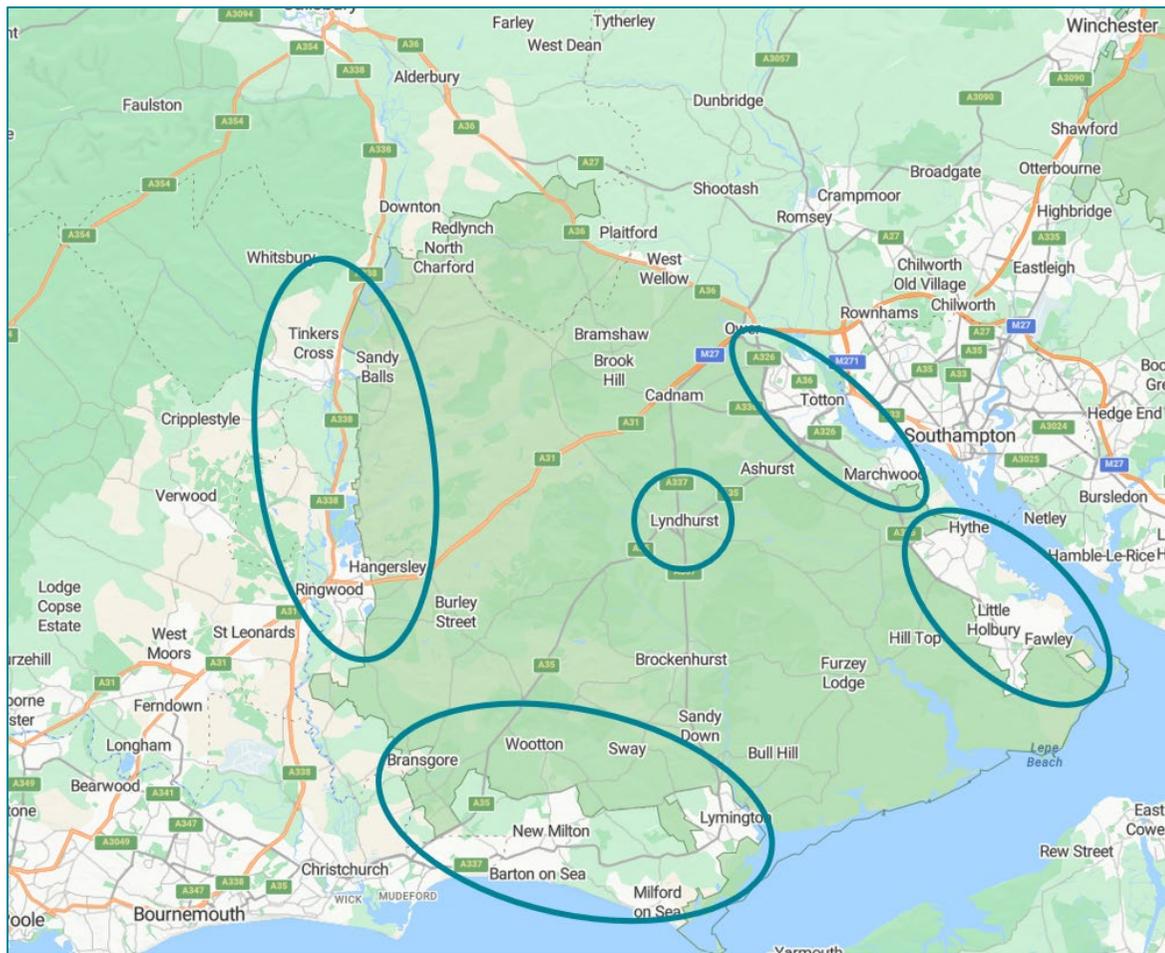
Portfolio overview

Our assets by type

The Council's General Fund accounts for a total of 366 assets. The non-operational assets are typically leased to 3rd parties to maintain and operate. In addition, NFDC hold the freehold on the land of c750 Beach Huts.



Summary of the current portfolio



The heat map shows the geographic distribution of assets. It reveals four concentrated areas of assets and loosely resembles a hub and spoke distribution, with Lyndhurst in the centre of the district.

Document title | Service name | Month and Year of publish

It is noted that geographic location of assets could be considered more of a strategic tool for the development of the appropriate service asset strategies and the council's overall operating model.

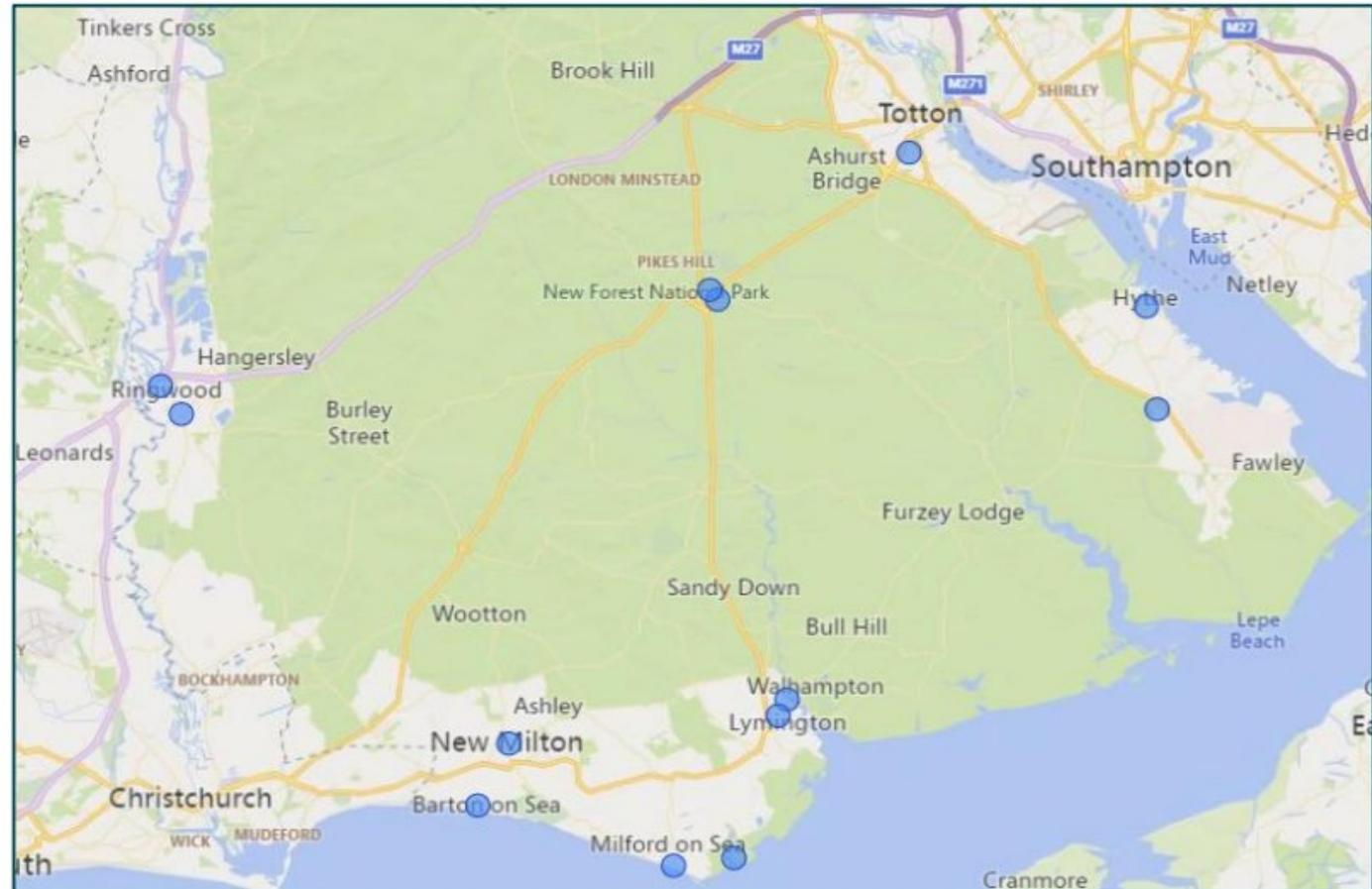
This map shows the locations of the operational estate, offices and depots. This geographic distribution may not reflect the service needs and demand. This will be highlighted via the Asset Challenge Framework.

Assets by type

- Operational 204
 - Freehold 191
 - Leasehold 13
- Non-operational 148
 - Freehold 145
 - Leasehold 3
- Investment 14
- Overall value £107.4m

Estate

- Footprint 770Hectares (Ha)
- Open space only 417Ha (Excluding foreshore)



Commercial and investment portfolio

The investment assets or 'commercial portfolio' have been purchased mostly since 2018, in addition to 3 historical assets, by taking professional advice to obtain a balanced portfolio and reduce the risk of voids and loss of the capital investment. This was all initially financed through internal borrowing.

Investment portfolio

The portfolio has been assembled to invest in the local business economy with a view to creating sustainable employment and other benefits to the district and its communities. Secondary to generate a return on the investments that make a significant contribution to the ongoing financing of council services, ensuring the financial sustainability of the council as government funding reduces.

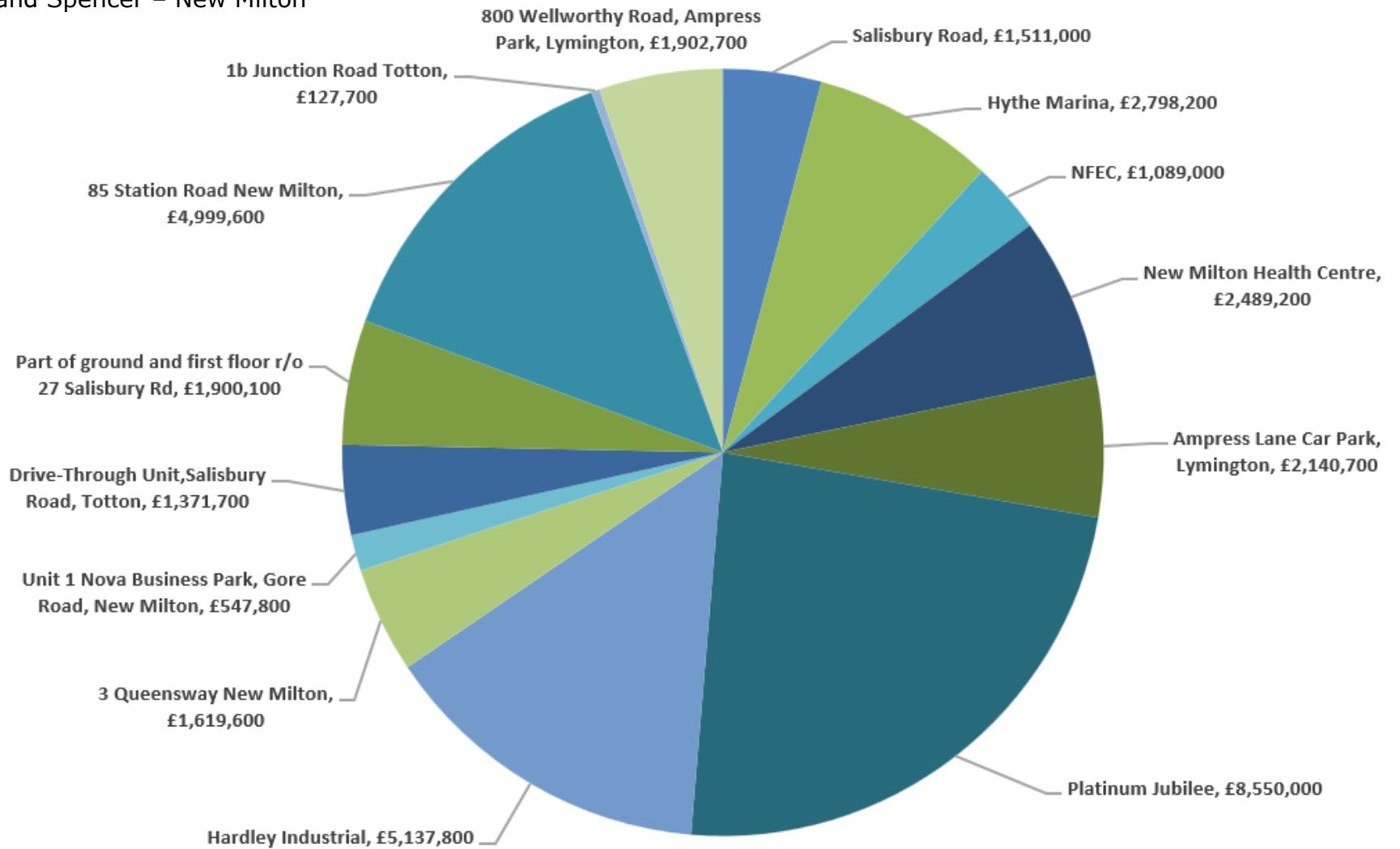
These assets can be reviewed to ensure that the return on investment is maximised and opportunities for development are actively explored to secure these returns in the medium to long term.

Where opportunities to acquire further investment properties occur, these will be explored, in line with the Councils Asset Investment Policy and subject to the relevant due diligence processes. Due to the current economic climate a decision was taken in 2023 to pause any future investment.

- Total assets 14
- Leases 56
- Gross income £1.84m
- Occupancy rate 91%
- Net book value £36.2m
- Yield 6%

Assets within the investment portfolio shown in the pie chart and include:

- Platinum Jubilee Business Park
- Hardley Industrial Estate
- Marks and Spencer – New Milton



Commercial portfolio

The lease register shows there are 301 assets leased out. 167 of these generate income greater than £100 per annum. The remaining 134 are classed as peppercorn leases.

- Total leases 301
- Peppercorn leases 134
- Gross income £619k
- Occupancy rate 87.4%

Appletree Holdings

Appletree Holdings are an arm's length group of companies. Wholly owned by NFDC, the remit is to invest in residential property and then letting to the private sector.

- Total assets 16
- Gross income £235k
- Net book value £5.1m
- Yield 4.61%

Overview of Estates and Facilities management

NFDC's estate comprises of 366 property and land holdings, with a combined footprint of 770 hectares. These consist of operational, non-operational (commercial) and investment property portfolios.

The Councils Estates and Facilities Management function sits within the Corporate Resources & Transformation directorate.

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.

The Estates team is responsible for a variety of property matters. These include the management of the Council's non-domestic commercial and investment assets.

Activities include:

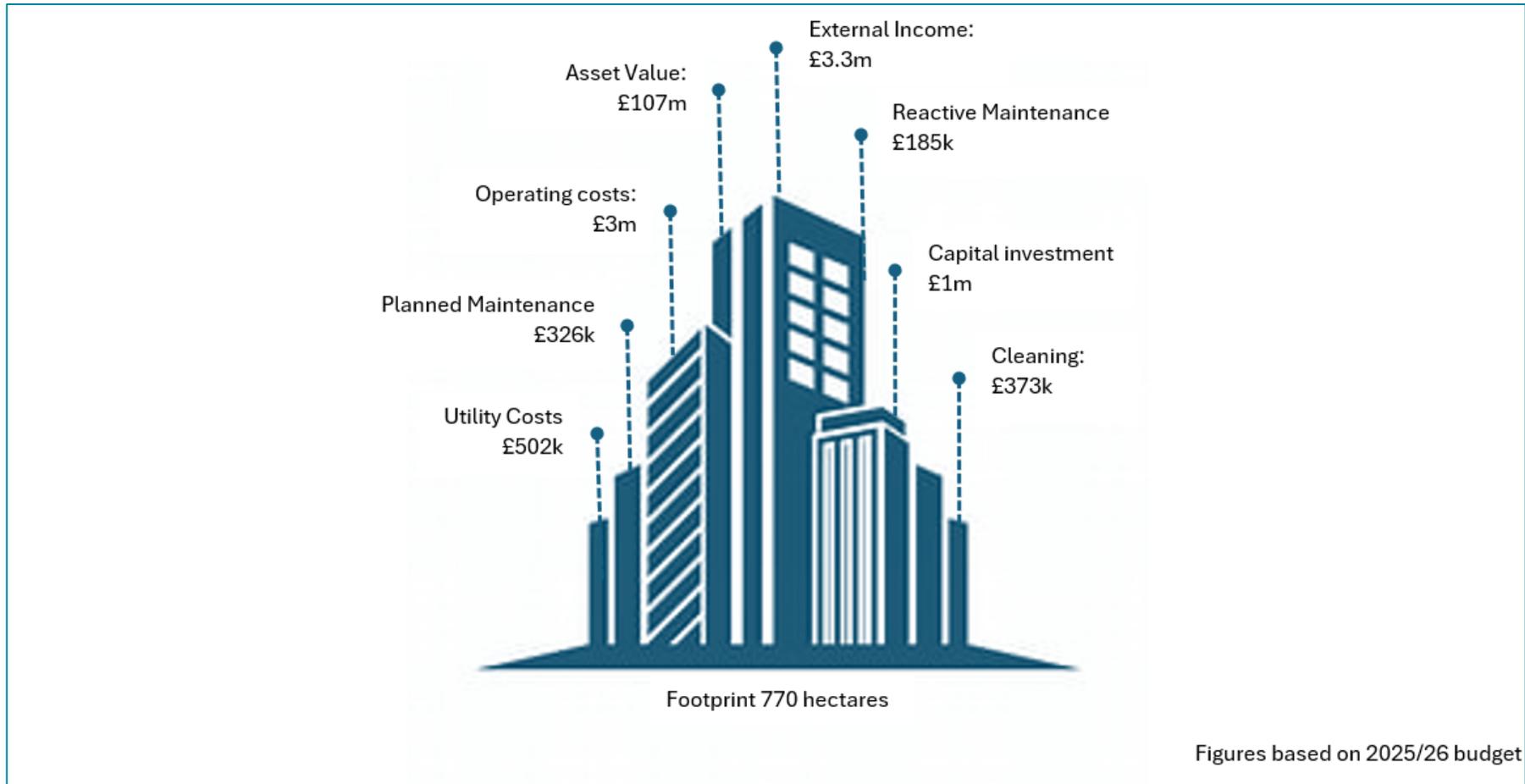
- Arranging asset valuations for all properties owned by the Council
- Ensuring a correct rates assessment of all the Council-owned properties
- Purchasing and selling Council properties and land
- Managing the leasing of properties owned by the Council and properties we lease from others
- Maintaining records of Council ownership

The Facilities Management team provides a range of property support services through a mix of in-house provision and outsourced contracted services. The team also rely on services to provide some low-level maintenance and housekeeping tasks, such as fire alarm testing and key holding at the depots.

Facilities Management oversight encompasses the management of buildings, infrastructure, and other facilities, as well as the services and processes required to keep them functioning effectively and efficiently.

Activities include:

- Planned and reactive works
- Building statutory compliance
- Property Management
- Cleaning services
- Energy management
- Space planning



Facilities Management have full budget control of 15 buildings with a responsibility for delivering planned and reactive works on a further 51 assets.

Alongside the management of the Councils property portfolio the function is responsible for the delivery of the FM related projects within the council's capital programme.

Asset management strategy

The strategy

Strategic Property Asset Management is the process which aligns business and property asset strategies, ensuring the optimisation of an organisation's property assets in a way which best supports its key business goals and objectives.

This strategy determines the high-level strategic framework for the effective management of our land and property portfolio (non-housing). It will guide decisions regarding the use of land and property assets ensuring that they support the optimisation of both financial and social value to meet the corporate objective of developing sustainable and resilient communities.

In all cases, assets will be aligned to delivering the Councils corporate priorities and must be maximised to ensure effective service, community or financial benefit. Financial conditions continue to be challenging, whilst customer expectations and demand is increasing.

In the development of the strategic asset management plan, the corporate plan has been reviewed to ensure that the SAMP priorities and corporate priorities align.

A high-level assessment of asset performance has been undertaken and the outcomes have assisted in developing the approach to ongoing estate reviews which will inform the SAMP.

Our Assets and Property are enablers which exist to meet corporate needs based on the council's priorities and service delivery requirements.

The five pillars

The following five Pillars set out the council’s approach to asset management, and guide future asset decision making. They reflect the role of Assets and Property as an enabler and demonstrate our ambitions to collaborate, rationalise, commercialise, decarbonise and innovate to contribute to the council’s priorities and support delivery of council services.

The asset management strategy will be reviewed on a regular basis and evolve to ensure its relevance to the changing landscape within which NFDC operates. This is particularly important where there is evidence of underperforming assets or opportunities to drive further value from the estate.

The five pillars



Pillar one: Digital asset management

SAMP objectives

1. 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.
2. 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.

Delivery mechanism

1. A fit for purpose digital system containing up to date and accurate records 'a single version of the truth'.
2. Proactive monitoring and managing the condition and safe use of buildings to provide comprehensive assurance of compliance and health and safety.
3. Oversight of suitable Key Performance Indicators.
4. Working with Service Areas to understand their current and longer-term requirements.

Digital Asset Management

A strong and robust grasp of asset management data and property records underpins effective asset management, enabling the efficient evaluation and comparison of properties and land to support decision making and robust record keeping supporting estate management and compliance activities.

NFDC do not currently employ a single system or a single source of data, rather using up to 9 separate systems, including as an example spreadsheets and CIPFA Asset Management software.

A fit for purpose digital system containing up to date and accurate records inclusive of, helpdesk, planned and reactive works by building and full details of the council's investment and leased estate will provide “a single version of the truth”.

As such this system will be a fundamental foundation for property asset management and assurance via the introduction of a key performance dashboard.

This means that the system will be a single source of property records and data. The property function will invest in populating the system fully, maintaining the integrity of data records over time, and integrating the new system functionality into day-to-day operations.

Proactive maintenance monitoring and implementing planned condition surveys will inform asset strategy on the estate and would enable the council to make informed decisions on the future use, informed budget setting and investment requirements of its estate.

The condition survey's will address the essential and backlog maintenance needs of our remaining buildings – repairing mechanical and electrical (M&E) systems and prolonging their operational lifespan in the most cost-effective manner.

Working closely with individual council services we will develop and assist in the development of their service plans ensuring consideration is given to current and future asset requirements. Having a holistic overview will enable the council to challenge the use of assets through the asset challenge framework.

Pillar two: Asset optimisation in support of Corporate Plan priorities

SAMP objectives

1. 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.
2. To ensure ownership and occupation of assets is robustly challenged.
3. To ensure the Council's maintenance and refurbishment / renovation programme is fully informed and prioritised.

Delivery mechanism

1. Challenge the use of the assets through an asset challenge framework.
2. Rationalise and reduce the number of buildings and areas of land where possible and appropriate, considering potential long- and medium-term needs, and ensuring assets are held for a clear purpose and provide best value.
3. Working with Services Areas in the development of their Service Plans to ensure consideration in relation to asset requirements.

Asset optimisation approach

The Asset Management plan must consider the potential impact on profitability, investment return and staff, as well as the internal structural and managerial implications.

For the Estates and Facilities Management functions to perform a leadership role in the organisational transformation agenda and secure savings, we will develop a mature understanding of our property data and opportunities to optimise the estate.

To act as a mature strategic property function, we will adopt a robust estate optimisation process; first at a high level, then by drilling-down and assessing the opportunities in the assets. Furthermore, opportunities will be developed with varying degrees of change that can be adapted to suit New Forest District's needs. Estate optimisation is not just about cutting costs, but is about bringing material advantages to our residents, and ultimately enhancing the delivery of the corporate objectives and strategy. The process of estate optimisation aims to identify and prioritise those sub-portfolios that have the greatest potential to release savings.

Core data for each building within the NFDC's portfolio including running costs, value, condition and backlog maintenance, suitability assessments and future need ratings will be reviewed.

Considering the incomplete and fragmented nature of property data we will take a pragmatic view to identify and plug any gaps in data. Using this process, those portfolios with high revenue spend and/or those areas subject to significant business change can be identified and subjected to a more detailed analysis and opportunity assessment.

The process to undertake the estate optimisation as outlined in the diagram overleaf. The outcome of this review will include:

- financial analysis of the estate
- potential revenue impact and capital generation opportunities
- ranked by the potential impact (low/medium/high) and ease of implementation (quick/medium/long term)
- quick wins which would help release existing liabilities
- longer term initiatives which may substantially change the way the estate is managed
- recommendations and next steps for how the opportunities could be delivered
- The potential identification of assets that are suitable for potential disposal

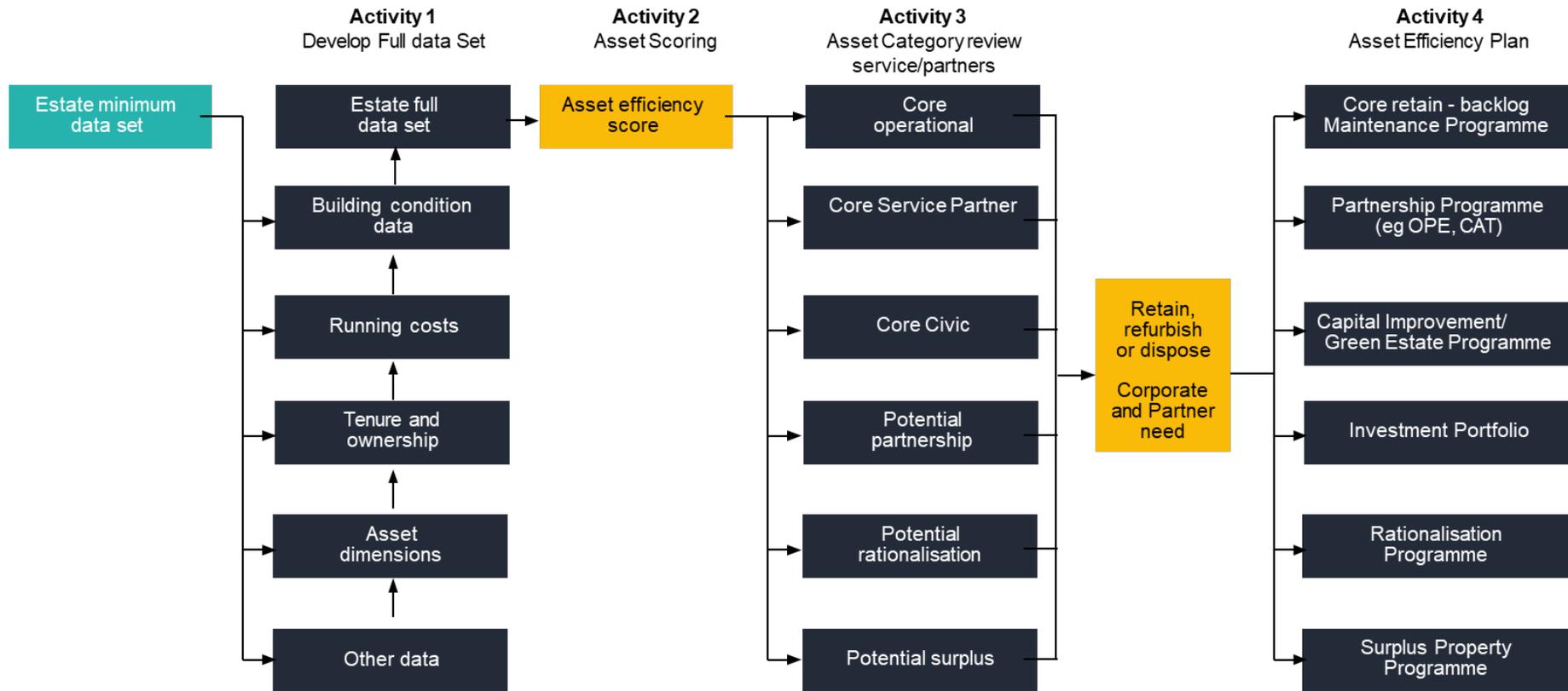
The asset challenge framework

The Asset Challenge Framework is a process to continually review our asset portfolio on a continuous rolling programme, ensuring that only those assets needed or performing to acceptable levels are retained.

The ultimate aims of asset challenge is to reduce costs, identify assets to be retained for use and/or invested in and those that can be disposed of. Each asset will be assessed periodically using the asset challenge steps and outcomes recorded within the asset optimisation section of the SAMP framework.

Strategic purpose	Opportunities and risks	Performance appraisal	Options appraisal	Pre-implementation consultation	Outcome
<ul style="list-style-type: none"> • Why do we have the asset? • What is its strategic purpose? • Who is accountable for performance of it? • What do we expect of it? • Is this financial, non- financial or both? 	<ul style="list-style-type: none"> • Are there any opportunities that could be developed? • Are there any blockages to exploiting these opportunities? • Any there any risks to overcome? 	<ul style="list-style-type: none"> • What is the financial performance being delivered? • Can non-financial benefits be quantified? • What are the management costs? • Are there any invisible costs? 	<ul style="list-style-type: none"> • Balance of performance opportunities and risks? • What options are available? • What are the relative costs and benefits of these options? • Do any options present increased risks? 	<ul style="list-style-type: none"> • Internal stakeholders • External stakeholders and partners 	<ul style="list-style-type: none"> • Retained • Repurposed / Regenerated • Recycled • Disposed (Asset Transfer or Open Market)

Estate optimisation model



Pillar three: Working with partners and communities to promote efficient and effective service delivery

SAMP objectives

1. To enable transfer of management / ownership of the asset where it can provide a benefit to service delivery and demonstrate longer term benefit.
2. Maximise efficient use of our assets through collaborative working with partners.
3. Improve efficient and effective asset use and value to the community.
4. Maximise the use of government available grants.

Delivery mechanism

1. Agree and adopt Community Asset Transfer (CAT) and Disposal Policies, identifying assets that local communities or not for profit organisations could be better positioned to deliver. e.g.
 - a. Community Halls
 - b. Public Conveniences
 - c. Open Spaces
2. Enhanced collaboration with partners, including our One Public Estate partners to identify innovation, efficiencies and maximise asset usage.

Partnerships – Working with Partners

The General Disposals Consent 2003 allows the Council to transfer the ownership and management of land and buildings they own to local communities at 'less than best consideration' (at less than full market value), where it can demonstrate the promotion of social, economic and environmental wellbeing support service integration, joint working and/or co-location.

Community Asset Transfer

If following a review of an asset via the Asset Optimisation Framework it may be deemed that the asset can meet the above criteria and be suitable for a Community Asset Transfer (CAT).

The principal aim of the Council's CAT approach is to ensure the efficient use of assets through community empowerment and minimise costs through retention or transformation.

Any transfer will follow the published Community Asset Transfer Policy.

Transfer of an asset may enable greater access and simplification for suitable grants.

This does not prevent community organisations nominating an Asset of Community Value, which if meeting the recognised criteria could be placed on the relevant register.

The Council intends that suitable assets will be made available through the CAT process in a way that:

- Ensures compliance with legislation (e.g. Section 123 of the Local Government Act)
- Encourages community empowerment and pride
- Helps develop strong, cohesive and sustainable communities
- Reduces holding costs, risks and related liabilities
- Helps develop strong, cohesive and sustainable communities
- Demonstrates a fair and transparent process

One Public Estate

One Public Estate (OPE) is a national programme, jointly managed by Cabinet Office and the Local Government Association, that brings public sector organisations together. It provides practical and technical support and funding to councils to deliver ambitious property focused programmes in collaboration with central government and other public sector partners (blue light services).

By working in partnership, we can look at how we can use our land and buildings collaboratively to:

- Improve public services to residents, visitors, employees and businesses in the county
- Renew and rationalise the public estate so there is a reduction in the amount of money we spend on buildings
- Free up much needed land for the development of housing, commercial and employment space
- Support local economic growth
- Generate capital receipts and income.

And it could include working with existing and developing partnerships with the likes of:

- Hampshire County Council
- Hampshire and the Isle of White Constabulary
- Hampshire Fire Service
- NHS
- RNLI

Partnerships – Locations

The Local Asset Reviews have sought to maximise the efficiency of the wider public sector corporate asset base to provide an integrated facilities with improved service delivery for users, focused on:

- Place based co-ordination to build/develop integrated services, retail, leisure/culture within neighbourhoods/town centres
- Co-location with other partners
- Integrated service delivery partnership combining public and private expertise and resources
- Provide assets that are easily accessible to communities.



Example map plotting: Public Conveniences located within New Forest District boundaries.

Pillar four: To reduce the environmental impact of council assets

SAMP objectives

1. Champion reduction in the environmental impact of occupation, use, travel and waste.
2. Protect our climate, coast and natural world.
3. The council to promote the target for net zero carbon for the benefit of our residents.
4. Identify areas of support or grants from external private or public sources.
5. Eliminate or reduce the use of fossil fuel systems and seek to improve thermal efficiency across the estate.

Delivery mechanism

1. Ensuring our assets are appropriately located to serve the Service and community needs.
2. Ensure new assets meet Climate Emergency pledges and reduce the consumption of embodied carbon in new build and refurbishment projects.
3. Proactively monitor performance of the portfolio and identify efficiency opportunities.
4. Explore the opportunities to use our land and buildings to generate renewable energy.

Environmental impact

The council has a climate and nature emergency action plan, targeting a significant reduction in carbon emissions from our buildings, external uses (i.e. street lighting) and transport fuel.

Carbon emissions from our buildings form the majority of council's total operation emissions and therefore how we manage, maintain, refurbish, redevelop or dispose of our buildings has great significance to the achievement of these aims.

The council owns a number of buildings of significant age which were designed to be used with heating and plumbing systems which have long become obsolete. In addition to

their energy inefficiency, some of these buildings represent a significant revenue drain in terms of repairs and energy costs.

In such instances therefore, the net zero and value-for-money agendas reinforce each other and may point towards either redevelopment or disposal of our buildings, although this will have to be assessed on a case-by-case basis via the Asset Challenge Framework.

The Council will lead by example for the benefit of our community.

Key Data	
CO2 Tonnage*	261 tons
Electricity	£303,500
Gas	£75,570
Water	£144,620
Total utility spend	£523,690

**Electricity is procured as a renewable energy and is CO2 reporting exempt (205 Tons).*

The SAMP will be a key enabler in helping to deliver against the Council's carbon Net Zero ambition by:

- Seeking to deliver sustainable MMC (modern methods construction) projects in line with reducing carbon footprint and utilising more brownfield sites.
- Ensure new assets meet Climate Emergency pledges wherever possible
- Proactively monitor and benchmark performance of the portfolio and identify efficiency opportunities.
- Further optimisation of Building Management Systems (BMS) across our estate.
- Proactively improving the EPC ratings of our asset portfolio.

What has been achieved to date

- Delivery of Hardley Depot to BREEAM Excellent Standards (final outcome pending)
- Externally funded installation of 2 x Air source heat pumps at Appletree Court.
- Secured Salex funding of up to £1.8M for the Installation of solar PV panels, air source heat pumps, window replacement and lighting upgrades over a 3-year period at Applemore Leisure Centre.
- Majority externally funded installation of 8 x EV charging points at Appletree Court.

Pillar five: To support economic growth, regeneration and prosperity

SAMP objectives

1. We will work with key partners to:
 - Support our business base and economic centres to thrive and grow.
 - Support economic growth and regeneration across NFDC.
 - Revitalise town centres through regeneration/ repurposing with a modern offering which fosters greater social interaction, community spirit, local identity and heritage.
2. We will manage our commercial portfolio effectively, balancing regeneration needs, job creation and income generation.
3. We will continue to consider direct delivery of affordable housing

Delivery mechanism

1. Invest in sites that meets our needs, invest wisely in our towns and communities, help drive sustainable growth and attract wider private sector investments.
2. Dispose of assets that do not align to our requirements / priorities, are a liability, or will not generate a return on investment.

Economic growth

The SAMP will support the District Council and wider business community across New Forest district by ensuring that Economic Development and Regeneration are embedded elements with the SAMP Objectives.

- Support long-term regeneration and growth of the district through strategic approach to development and management of Council's assets
- Ensure that wider regeneration and community benefits are derived from acquiring, developing and divesting assets
- Provide a framework and strategies for the development of assets for housing, transport, and parks
- Achieve wider regeneration benefits by sharing asset through one public estate initiative
- Contribute to the delivery sustainable housing growth by using Council's assets to control or shape developments with other sectors
- Support infrastructure and land assembly for regeneration projects
- Promote development sites for future growth
- Support the delivery of new developments and strategic needs
- Given scale of development needs look to assemble underused brownfield sites for commercial gain and better use of Council assets

What has been achieved to date

- Delivery of Platinum Jubilee Business Park
- Refurbishment of Totton shopping arcade

Priority projects

Totton masterplan

The Council has also commissioned master planning work on Totton which will inform opportunities for regeneration including public realm, art and culture. Supporting businesses in part by way of an investment plan.

The Solent Freeport

The Solent Freeport is a unique opportunity to bring sustainable economic growth to the NFDC district.

In particular, it provides the vehicle and focus to deliver the Council's Waterside visions, realising investment on sites of national significance.

Which includes several development sites giving businesses operating within the designated area access to tax benefits such as enhanced capital allowances. Forecasted benefits to the district include several thousand jobs and significant pooled retained business rates over 303ha of development land.

The Solent Freeport will:

- Be a hub for global trade and investment
- Promote regeneration and job creation
- Create hotbeds for innovation

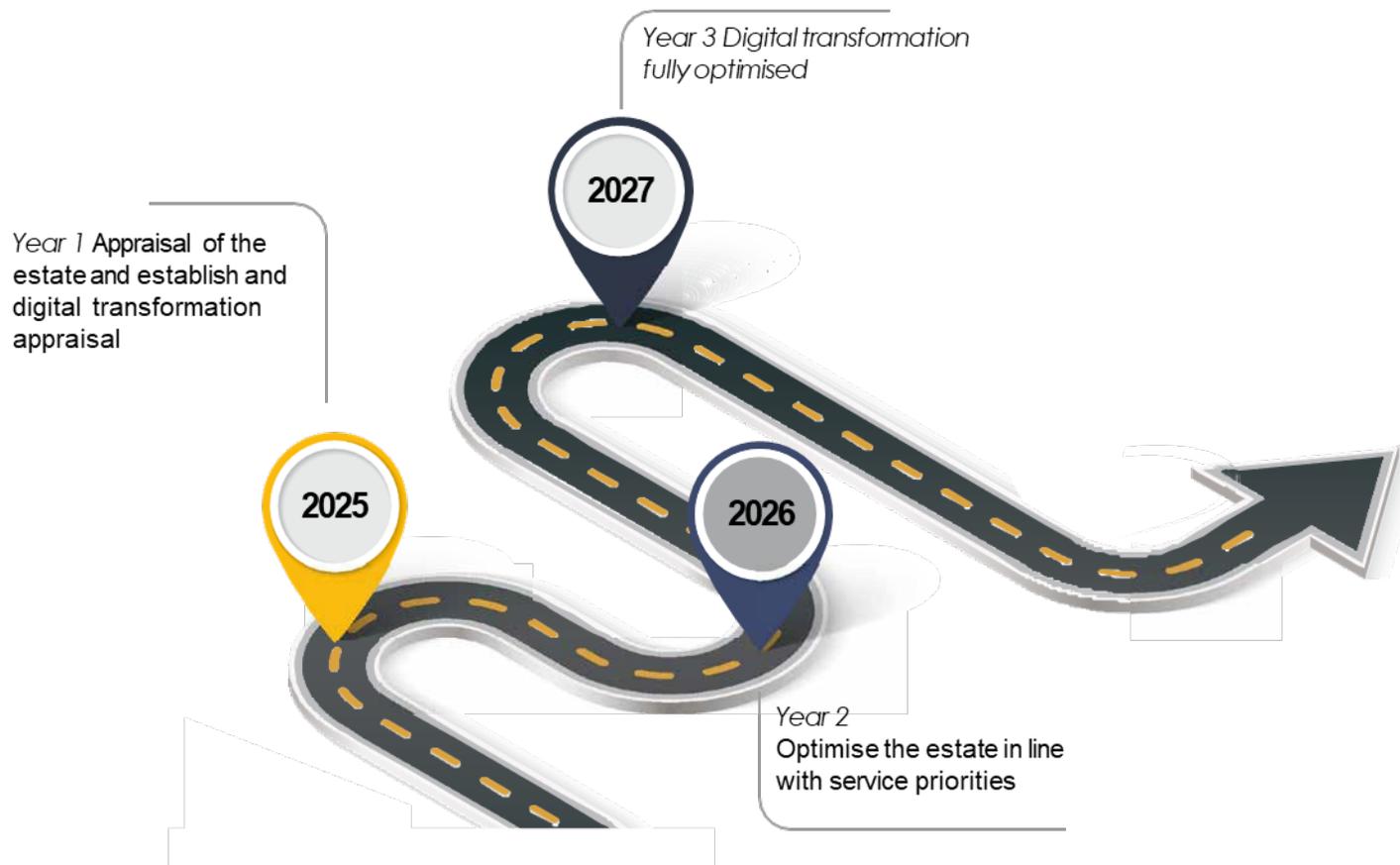
The Council should look to use existing assets to help support the delivery of the freeport such as providing mitigation land.



Asset Management Action Plan 2025-2028

SAMP Roadmap

To keep the asset management strategy relevant and aligned to changing corporate priorities, it will evolve over time. Each of the five pillars is supported by an Asset Management Action Plan with detailed objectives and actions.



Five pillars headline plan

Pillar	Year 1	Year 2 - 3
Digital asset management	<ul style="list-style-type: none"> • Develop digital asset platform specification • Digital systems market appraisal v inhouse solution • Complete asset data refresh • Introduce Key Performance Indicators 	<ul style="list-style-type: none"> • Estate optimisation development with service areas • Establish core corporate programmes of work from estate optimisation
Asset optimisation in support of corporate plan priorities	<ul style="list-style-type: none"> • Occupation and use of assets are reviewed, and asset framework challenge initialised • Condition surveys and initial refurb / regen prioritisation undertaken • Works underway for refurb / regen of initial prioritised assets • Full lease review 	<ul style="list-style-type: none"> • Review and action plan for non-income generating non-operational assets • Introduce measures to drive A low carbon public estate • Maintenance programme underway according to prioritised schedule
Working with partners and communities to promote efficient and effective service delivery	<ul style="list-style-type: none"> • Identify assets suitable for CAT • Identify options for collaborative working with partners, including OPE 	<ul style="list-style-type: none"> • Progress 'quick-win' Community Asset Transfers (being mindful of LGR timeline and required governance)
To reduce the environmental impact of council assets	<ul style="list-style-type: none"> • Define criteria for sustainability within portfolio 	<ul style="list-style-type: none"> • Embed energy efficient criteria to all projects • Benchmark running costs of assets against the market

	<ul style="list-style-type: none"> • Optimise Building Management Control Systems • Identify avenues for additional green funding 	<ul style="list-style-type: none"> • Deliver PSDS project
To support economic growth, regeneration and prosperity	<ul style="list-style-type: none"> • Totton Town Regeneration master planning • Continue engagement in Freeport 	<ul style="list-style-type: none"> • Promotion of NFDC priorities within the Freeport program

Measuring success and performance

Performance

Annually the priorities will be identified and appropriate performance measures applied. Each pillar will have specific key performance indicators with measurable targets.

Overall performance measures for this may include (but are not limited to):

Appropriate data improvement relating to time, cost and quality

- Validation and quality of asset data
- Improvement in customer satisfaction results
- Continual process/procedure improvement based on feedback

Assessment of asset performance

- Utilisation and improvement to operational requirement satisfaction
- Improvement in the rate of occupation of assets
- Improvement in appropriate financial target
- Reduction in operating costs

Reduction in compliance and safety matters

- Compliance of the asset
- Time lost through assets not being adequately maintained
- Areas of risk to safety
- Energy performance
- Reactive vs Planned maintenance ratio
- Maintenance deficiency affecting service delivery
- Performance against budget

Financial performance indicators for income and expenditure for the estate

- Returns that reflect risk exposure
- Asset utilisation
- Current cost of the estate
- Future cost of the estate
- Capital receipts realised against realistic targets

Environmental performance targets

- Reduction in utility and energy usage

Document title | Service name | Month and Year of publish

- Reduction in EPC
- Reduction in carbon emissions
- Percentage of land release
- Revenue savings

Measures against targets appropriate to the regeneration projects

- Target delivery
- Use of s106 contributions measurement against outcomes

Approach to governance

Asset disposal governance

As part of the SAMP, land and property assets held by the council will be appraised and considered for disposal and potentially surplus to requirements if any of the following examples apply:

- The Asset Challenge Framework has been completed
- The Asset no longer makes a positive contribution to delivery of council services
- The revenue and capital demands to maintain far outweigh any income of financial or policy benefits
- Has no potential for future strategic regeneration and/or redevelopment purposes
- An alternative site can provide a more cost effective and efficient service
- No adopted and resourced council plan/policy/strategy, that could bring the asset into use in foreseeable future
- No potential advantageous shared use with partners (One Public estate/CAT)

The Council recognises that good governance is a key component of this strategy, so it is essential that all decisions to dispose of an asset must be subject to gateway approvals.

Each Gateway has clear owners and defined roles and responsibilities to progress matters and attain necessary approvals.

Full details are contained within the Asset Disposal Policy.

Asset disposal governance matrix

Stage		Action	Responsible	Informed	Decision Point
1	Asset Challenge Framework	<ul style="list-style-type: none"> Asset identified as surplus or underperforming. Potential better model of delivery 	Head of Estates and Facilities Management Estates Manager	Strategic Director Corporate Resources & Transformation	
2	Internal Review	<ul style="list-style-type: none"> Request Title Report, red line and terrier report to see if there any covenants, charitable land etc. Review details with transformation board Notification given to internal stakeholders of availability of asset What is the likely disposal timeframe? Is the asset suitable for community asset transfer. If "Yes" then consider potential CAT (follow CAT Policy) 	Legal	Service Manager Transformation Board Portfolio Holder Ward Member	

		<ul style="list-style-type: none"> • If no suitable options prepare for disposal and place asset on surplus land/asset register 			
3	Preparation for Disposal – Capital Receipt	<ul style="list-style-type: none"> • Professional valuation (x 2 if >£100k) • Consult with Ward Members • If Asset is an ‘Asset of Community Value’ then the community has 6 weeks to express an interest in buying • Write Disposal Business Case paper for the disposal. To include scoring key decision scorecard 	Estates	Ward Member	Transformation Board
4	Approval to proceed with disposal	<ul style="list-style-type: none"> • Key decision if value > £150k OR the asset covers multi-wards OR if high score is returned on key decision scorecard. • Review Business Case Decision paper • Agree any reserve valuation 	Strategic Director Corporate Resources & Transformation	Estates Ward Member	Transformation Board / Council
5	Property disposal	<ul style="list-style-type: none"> • Proceed with agreed disposal route 	Estates		

		<ul style="list-style-type: none"> • If land is 'Open Space' then it will require additional steps outlined in the Disposal Policy 			
6	Evaluation and Council consultation	<ul style="list-style-type: none"> • Review offers • Completion of Business Case Decision Paper with recommendations • Council consultation of submission/decision • Approve sale – depending on sale value and delegated level of authority. 	<p>Estates</p> <p>Strategic Director</p> <p>Corporate Resources & Transformation</p>		Transformation Board
7	Practical completion	<ul style="list-style-type: none"> • Instructions to Legal preparing/completion of agreements • Receive Capital Receipt 	Legal		

Community asset transfer governance

The community asset transfer (CAT) policy is a key enabler as part of the Council's Strategic Asset Management Plan (SAMP), ensuring property assets held by the council will be appraised and considered for use or transfer into the community.

The Council's portfolio of assets is varied in tenure and use and the pace of change in how the Council meets new and challenging service needs means the asset base must constantly evolve to respond to help improve and develop new delivery solutions.

The Council sees this challenge as an opportunity. There will be instances when Council owned community assets often used by VCOs (Voluntary or Community Organisation) are returned to the Council, become surplus to requirements, are functionally or economically obsolete or may have the opportunity of being more effectively run by the communities themselves. Further details are contained within the Community Asset Transfer Policy.

The principal aim of the Council's CAT is to ensure the efficient use of assets through community empowerment and also minimise costs through retention or transformation. The Council intends that suitable assets will be made available through the CAT process in a way that:

- Ensures compliance with legislation (e.g. Section 123 of the Local Government Act)
- Encourages community empowerment and pride
- Reduces holding costs, risks and related liabilities
- Demonstrates a fair and transparent process
- Helps develop strong, cohesive and sustainable communities
- Ensures sustainable CATs do not conflict with other community projects.

Eligibility

Each organisation wishing to apply for CAT needs to meet the following criteria:

- Charitable or not-for-private-profit organisation
- Generate social, economic or environmental benefits which directly benefit the people of the New Forest District
- Benefit a wide and diverse a range of local people as possible
- Have the capacity and resources to manage the asset and have directors or committee members who have the necessary experience and skill

NOTE: We will continually make available assets available for transfer and provide a defined expression of interest form for interested parties to apply

Community asset transfer governance matrix

Stage		Action	Responsible	Informed	Decision Point
1	Asset identification	<ul style="list-style-type: none"> • Potential CAT identified as part of the disposal process • Preferred transfer route agreed. This could be an open marketed CAT or if better served by a singular organisation i.e. Town / Parish Council 	Estates		

2	Preparation for CAT disposal	<ul style="list-style-type: none"> Professional valuation (x 2 if >£100k) Consult with Ward Members (20 working days) If Asset is an 'Asset of Community Value' then the community has 6 weeks to express an interest in the transfer Write Business Disposal Business Case paper for CAT 	Estates Strategic Director Corporate Resources & Transformation	Strategic Director Corporate Resources & Transformation Finance Portfolio Holder	
3	Approval to proceed with CAT	<ul style="list-style-type: none"> Key decision if value > £150k or the asset covers multi-wards. Or if a high score is returned on the CAT scorecard Review decision paper Agree any terms of transfer and route 	Strategic Director Corporate Resources & Transformation	Estates Ward Member	Transformation Board / Council
4	Expression of Interest	<ul style="list-style-type: none"> Create information pack Advertise the opportunity (4 weeks) if applicable e.g. not for direct route freehold Receive informal enquiries Review and score informal expressions of interest 	Estates	Portfolio Holder Ward Member	

		<ul style="list-style-type: none"> Selected organisations to submit business case 			
5	Formal Submissions of Interest/ Bids	<ul style="list-style-type: none"> Inform organisation Receive formal enquiries Consult with Organisations Evaluation and scoring of bids Completion of Portfolio Holder Decision Paper with recommendations Council consultation of submission/decision 	Estates	Strategic Director Corporate Resources & Transformation Finance Portfolio Holder	Transformation Board
6	Evaluation and Council Consultation	<ul style="list-style-type: none"> Presentation of business case and feasibility assessment by bidding organisation(s) Evaluation and scoring of bids Completion of Disposal Business Case Decision Paper with recommendations Council consultation of submission/decision 	Estates	Strategic Director Corporate Resources & Transformation Finance Portfolio Holder	
7	Practical Completion	<ul style="list-style-type: none"> Instructions to Legal preparing/completion of agreements 	Legal		

8	Monitoring	<ul style="list-style-type: none"> Monitoring arrangements post transfer 	Estates		
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Asset investment / acquisition

The Council remains of the view that purchases of commercial properties and future development (including re-development of land or the repurposing of existing Council real estate) when made on a cautious and prudent basis will over time contribute to the Council’s vision and priorities as set out in full in the Asset Investment Policy (which also outlines the governance arrangements in place).

Land and property interests should be considered for acquisition if the following circumstances apply:

- The acquisition will make a positive contribution to the current or future delivery of council services
- The acquisition has economical benefits in reducing occupational costs (revenue and capital)
- Asset meets minimum requirements of the Investment Policy
- The asset provides the opportunity promote or support economic activity with the New Forest District.
- To achieve the minimum evaluation requirement of yield, that is to ensure the income from the investment does not place an additional financial burden on the General Fund
- Option appraisal has been undertaken which highlights acquisition as the most economic and efficient means of service delivery, for council and wider public services
- The acquisition of the interest has potential for future strategic regeneration and/or redevelopment or contributes to wider corporate objectives and appropriate funding has been identified.

Major development and capital project governance

A key principle of the 'Strategic Asset Management and Major Developments' delivery programme is to ensure the Councils capital investments are managed effectively through the adoption of a streamlined gateway review process that will ensure that:

- Money is well invested
- Proposals are thoroughly assessed and align with SAMP and Corporate objectives
- Projects and Programmes are delivered on time, to budget and quality
- Change is delivered to a high standard (efficiently and controlled)
- Benefits and project outcomes are clearly defined and tracked
- Projects have been through appropriate approval process at key defined stages (Can't pass through a gateway without necessary approval)
- Capital spend assessments are looked at quarterly to review the gross position, liability and risks to council and partners
- Communications are improved with clear accountability and responsibility matrix defined on all projects

The annual project 'bid' process as included within the budget preparation cycle, and the gateway stages as included within Contract Standing Orders provide the necessary governance to ensure rigorous program approval and delivery.

Appendix – Plan on a page

Strategic Asset Management Plan 2025 – 2028

To provide the right property, of good standard, in the right place to meet current and future service needs

