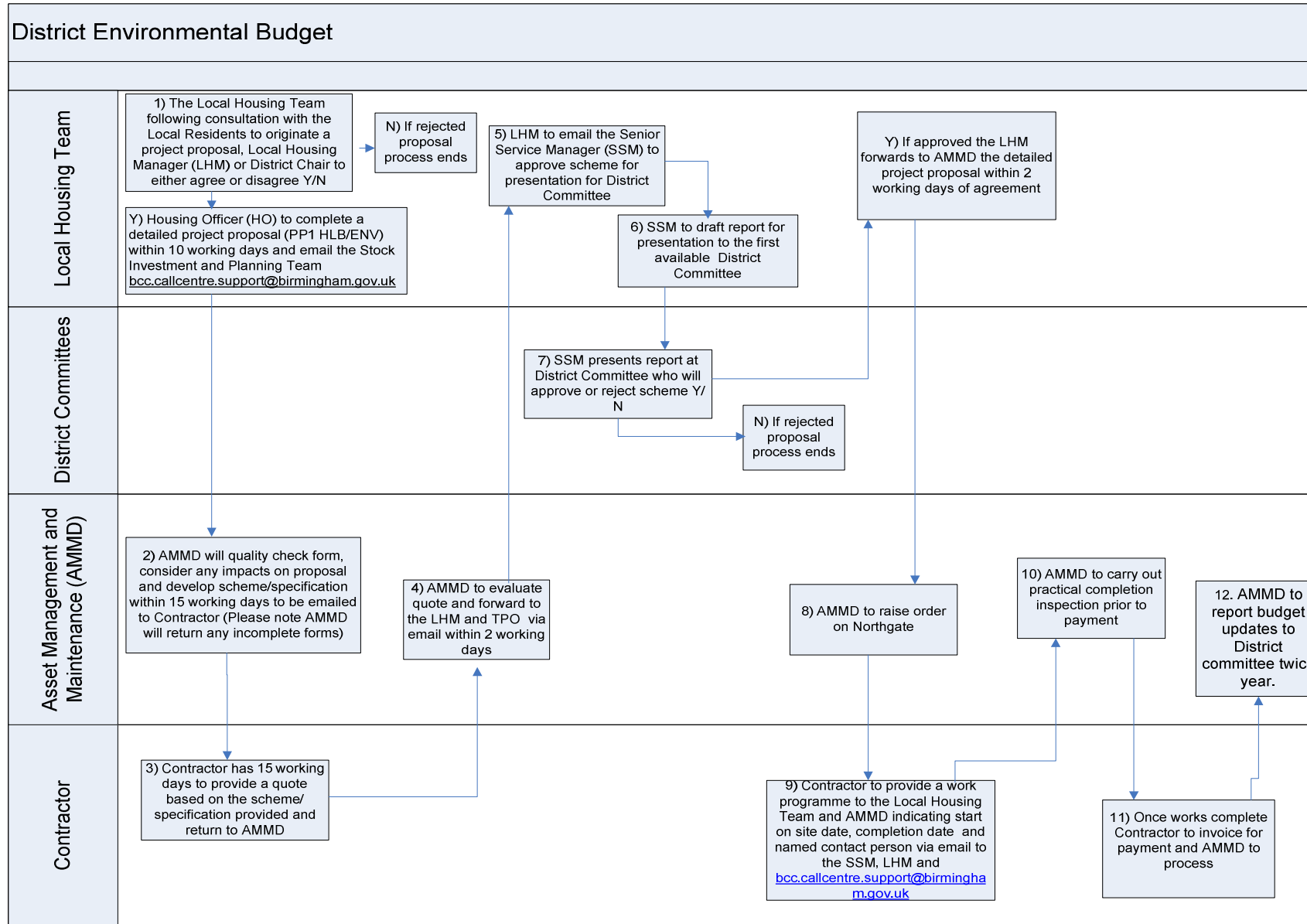


BCC Asset Management and Maintenance: Standard Operating Procedures

1. PROCESS OVERVIEW

Process Name	Environmental Budget
Process Reference	
Service Area	BCC Asset Management and Maintenance Division
Process Summary	This process details the steps taken in relation to all projects for Environmental Works
BCC Senior Responsible Officer	Martin Tolley
Frequency	When projects identified
Inputs	
Outputs	
Links to other Processes	
Systems Used	Northgate Voyager
Templates / Tools	See below

2. PROCESS MAP – DISTRICT ENVIRONMENTAL BUDGET



3. OPERATIONAL PROCESS DETAIL

Step No.	Process Step	Detailed Description	Timeline	Organisation and named contact	System Required	Outputs and Templates
1	The Local Housing Team following consultation with the Local Residents to originate a project proposal, Local Housing Manager (LHM) or District Chair to either agree or disagree Y/N	When Local residents make a request for an environmental project to be considered in their area the relevant HO will meet to gather initial intelligence utilising cameras/camera functions i.e. mobile phones, along with a comprehensive set of notes of what is required by the customers.	5 working days	Landlord Services HO	Word, Outlook,	To be designed by Landlord Services if required
1N	If rejected proposal process ends	If deemed unfeasible by the LHM the project will be rejected and the relevant customers notified by the LHM and HO	5 working days	Landlord Services HO	Word, Outlook	To be designed by Landlord Services if required
1Y	Housing Officer (HO) to complete a detailed project proposal (PP1 HLB/ENV) within 10 working days and email the Stock Investment and Planning Team bcc.callcentre.support@birmingham.gov.uk	The HO will completed a detailed project proposal ensuring all required details are provided to AMMD via email the generic inbox of the Stock Investment and Planning Team bcc.callcentre.support@birmingham.gov.uk to establish feasibility on all projects	10 working days	Landlord Services HO	Word Outlook	Form 1

Step No.	Process Step	Detailed Description	Timeline	Organisation and named contact	System Required	Outputs and Templates
2	AMMD will quality check form, consider any impacts on proposal and develop scheme/specification within 15 working days to be emailed to Contractor (Please note AMMD will return any incomplete forms)	On a daily basis the Stock Investment and Programme Team will check for receipt of project proposals, these will be assessed by the relevant technical staff and if acceptable will scope works and forward to the LHM and Contractor or seek further clarifications from LHM	15 Working days	AMMD – Stock Investment and Programme Team	Word, Outlook	Tim Triance to provide a standard template
3	Contractor has 15 working days to provide a quote based on the scheme/specification provided and return to AMMD	The Contractor to provide quote based on AMMD's scheme/specification within the given timescale of 10 working days by email to the Stock Investment and Programme Team bcc.callcentre.support@birmingham.gov.uk	15 Working days	North, South and Central Contractor	Outlook	Quote, Contractor to provide standard template for all quotes
4	AMMD to evaluate quote and forward to the LHM and TPO via email within 2 working days	AMMD will check quote provided by the Contractors and if quote suitable will forward to the LHM within 2 working days via email	2 Working days	AMMD – Stock Investment and Programme Team	Outlook, Word	
5	LHM to email the Senior Service Manager (SSM) to approve scheme for presentation for District Committee	The SSM will either approve or reject the project/quote provided by the Contractor within 2 working days via email to the LHM and bcc.callcentre.support@birmingham.gov.uk	2 Working days	Landlord Services SSM	Outlook	Email confirming course of action
6	SSM to draft report for presentation to the first available District Committee	SSM to complete the District Committee report template to seek approval for the project	Follow timeline of District Committee reporting process	Landlord Services SSM	Word	District Committee template

Step No.	Process Step	Detailed Description	Timeline	Organisation and named contact	System Required	Outputs and Templates
7	SSM presents report at District Committee who will approve or reject scheme Y/N	SSM liaise with the relevant District Committee Support Officer to obtain a slot on the agenda and provide any required documentation prior to attending	Follow timeline of District Committee reporting process	Landlord Services SSM	Word Outlook	District Committee template
7N	If rejected proposal process ends	Once rejected at District Committee the SSM will notify AMMD, LHM, HO and customers	5 Working days	Landlord Services SSM	Word, Outlook	To be designed by Landlord Services if required
7Y	If approved the LHM forwards to AMMD the detailed project proposal within 2 working days of agreement	If project agreed at District Committee will then submit the detailed project proposal to the relevant Contractor with a copy to AMMD bcc.callcentre.support@birmingham.gov.uk	2 Working days	Landlord Services LHM	Word, outlook	Form 1
8	AMMD to raise order on Northgate	Once quote agreed the LHM will email the generic inbox bcc.callcentre.support@birmingham.gov.uk and AMMD will raise an adhoc job on Northgate using the SOP ???? to provide both the LHM and Contractor with a job number.	2 Working Days	AMMD – Stock Investment and Programme Team	Northgate, Word, Outlook	Job number
9	Contractor to provide a work programme to the Local Housing Team and AMMD indicating start on site date, completion date and named contact person via email to the SSM, LHM and bcc.callcentre.support@birmingham.gov.uk	Once contractor has received a works order, within 1 working day they are to provide the SSM, LHM and bcc.callcentre.support@birmingham.gov.uk with an email confirming acceptance of orders with a start on site date and a completion date, also indicating project coordinator and relevant contact details. Contractors to also provide regular progress updates to the above	1 Working day	North, South and Central Contractor	Northgate, Word, Outlook	Contractor email

Step No.	Process Step	Detailed Description	Timeline	Organisation and named contact	System Required	Outputs and Templates
10	AMMD to carry out practical completion inspection prior to payment	AMMD Contracts Works Officer to maximise opportunity to carryout onsite audits although smaller projects may rely on telephone audits. Contract Works Officer to organise schedule of audit inspections dependant on length/size of project and to also email SSM, LHM with results of inspections	1 Working day of inspection	AMMD – Stock Investment and Programme Team	Word, Outlook	Email
11	Once works complete Contractor to invoice for payment and AMMD to process	The contractor to invoice BCC for payment on completion of the project	Completion of works	North, South and Central Contractor	Voyager	Invoice
12	AMMD to report budget updates to District committee twice year.	AMMD GR5 to produce a budget report for each district twice yearly (May and November, unless otherwise agreed) to update on the budget spent and overview of works in progress and available budget.	Twice yearly	AMMD – Stock Investment and Programme Team	Excel, word	Budget report

4. PROCESS DEVELOPMENT HISTORY

Version	Modified By	Date	Reason	Approved By	Amendment Details
0.0	Laura Tucker	27.06.13	Creation	Martin Tolley	
0.1	Laura Tucker	29.01.14	Extra 5 days added to time scale in 3	Tom Taplin	

Key Stakeholders

Name	Position / Role	Details of consultation / review	Date

Documentation Consulted

Title	Author	Date Reviewed

Process Sponsor Sign Off

Name	Position	Version Reviewed	Date
Martin Tolley	Integrated Service Head	1.0	

Key Issues and Business Decisions Pending

Issue or Business Decision	Owner	Contact for Resolution	Date Of Resolution

Project Proposal (PP1 HLB/ENV)– District HLB and Environmental Budget (PART A – Forward to Central Housing Services & Retain Copy for NHM Approval & Office Records)

1. Project Name:

Project Name:		Unique Ref No:	
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2. Budget Details:

Budget Information:		Budget Code:	
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3. Contact Details:

Constituency:		HLB Area or Aerial Block:	
H.O./T.P.O. Contact Name:			
Contact Address: (Inc post code)			
Telephone No'		E-mail Address:	
Mobile No'			

4. Project Location - Housing Officer/T.P.O.

(Address: Details of where work is to be carried out)

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5. Project Description - Housing Officer/T.P.O.

6. Supporting Information attached - Housing Officer/T.P.O./H.L.B Rep:
(List: Maps/Plans/Photographs)

A) Location Map at **1:2500** scale showing location of building or land where work to be carried out. This is to assist Surveyors, and Contractors when attending site meetings:

Paste Location Map (A) here:

B) Plan at **1:250 or 1:500** scale showing position of work item requested (e.g. Gates, fencing, benches, shrub beds, and other external work). This is required to reduce the potential for abortive work.

Paste Sketch Plan (B) showing where item/s required here:

C) Photo/s showing location where work is to be carried out. This is required, to assist officers, surveyors and contractors to identify any issues which may affect the viability of Project Proposals, and impact on cost estimates.

Paste Photo/s (C) here:

Date Submitted	
Date Input	
Date forwarded to partner	
Date of site meeting	
Date of schedule – 20days	
Date costs forwarded to District Committee	
Date cost approved by District Committee	
Date order issued	
Date works starts on	
Completion of Target works	

Project Proposal District Environmental Budget (PART B – Retain for NHM Approval & Office Record Only – Do not Forward)

7. Purpose of project? (You may tick up to 3)

Reduce crime, vandalism or anti-social behaviour		Work that benefits the community and not individuals		Compliment other improvements (Joint working)		Project that increase sustainability of an area	
Project that increase access or encourage involvement							
Other							

8. Target Group? (You may tick up to 3)

Tenants		Community		Customer Forum	
Resident		Schools		Young people	
Other					

9. Is Consultation Required? Yes/No, and if Yes - Who is to be consulted?

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10. What were the results of the consultation?

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11. Expected Project Outcomes: (You may add other outcomes)

1	(Involvement)
2	(Cohesion)
3	(Other)
4	Community Empowerment

12. Decision (Tick Box)

Approved		Declined	
Conditions			

13. Authority to Proceed

Authorised By	Signature	Position	Date

14. Budget Approval

Expenditure		Income		In kind support
Headings/code	Amount	Sources	Amount	
Totals				

Procedure Note: Completion of Project Proposal Form District Environmental Budget

PART A – PROJECT REQUEST (FORWARD & RETAIN COPY)

- 1. Project Name:** Insert the name of the project as you wish it to be referred to (e.g. **Maypole Grove – Security Work**). The box on the right refers to a Unique reference no'. This will be provided by the 'Management Contractor' once the project has been costed, and approved, at which stage the TPO/HO should insert the information in the box provided, and include in the title of all correspondence regarding the project.
- 2. Budget Details:** Enter Budget details (e.g. **HLB, AERIAL, or COMMUNITY CHEST**). In addition insert in the right hand box, the budget code to be used for this work, this can be found in the top right of the HLB/Aerial Spreadsheet. **The project will not proceed further unless this section is completed.**
- 3. Contact Details:** Insert all information relating to the **Housing Officer/T.P.O.** who is to take responsibility for the project. It is important that full contact information is provided in order that both Technical Officers and Contractors can make contact easily should any issues arise with respect to delivery of the project, including contact to arrange site visits to confirm the location where work is to be carried out.
- 4. Project Location:** Provide description of where the work is to be carried out including full address/s, and post code.
- 5. Project Description:** Provide a brief outline of the project identifying why the work is required, what is the objective, and how the proposal will resolve the issue. Further detailed information should include metric measurements where elements such as fencing, paving, or brickwork are required. (e.g. Consider what type of fencing is required, metal/timber?, how high?. How long is the fence/wall? Etc).
- 6. Supporting Information:** The **Housing Officer/T.P.O.** must provide along with the written description the following:
 - a. Location map** – These can be produced using 'Local View' and entering an address search. Map should be produced to the scale identified on the form.
 - b. Sketch Plan** - Where external work is required such as fencing, gates, chicanes, paving, bollards, road markings etc. Map should be produced to the scale identified on the form.

- c. **Photos** - Well framed clear photographs of the location/s. This is particularly useful to assist Technical Officers and Contractors in making assessments of any difficulties or issues which might arise, and making more accurate cost estimates/quotations. (e.g. how will signs/benches/posts etc be fitted. Are there any obvious signs of underground services in the area the work is likely to be carried out.)

PART B – PROJECT DECISION AND APPROVAL PROCESS (RETAIN COPY)

7. **Purpose of Project:** - Tick boxes as appropriate, and add comments/supporting information to establish criteria which will support approval of the project.
8. **Target Group:** Additional criteria to support project
9. **Is Consultation Required?:** Particularly where communal areas are concerned it is important that anyone with a right to share that area, (e.g. Garages, Gardens, Community Rooms, rights of way, pavements etc) is consulted, and that we keep a record of such consultation and the results of that consultation, in order to substantiate our actions.
10. **Results of Consultation:** Clarify broad results of consultation and where evidence of consultation is stored for future reference.
11. **Expected Project Outcomes:** General information to substantiate use of funding
12. **Decision:** For Constituency Team Records.
13. -14. To be completed by **H.O./T.P.O/D.H.M.**