

Report to ACES Council meeting 26 January 2018

ACES membership review – final report

1. This is the final report which provides an overview of the membership survey, and presents recommendations to Council. The report considers the role and objectives of ACES, the benefits of ACES membership, and membership criteria.
2. At the ACES Council meeting in Manchester on 18 August 2017 it was agreed to authorise the Senior Vice-President to undertake the membership survey via SurveyMonkey, following the finalisation of questions by the Working Group.
3. The Working Group comprises Richard Allen, Neil Webster, Chris Rhodes, Trevor Bishop, Graeme Haigh, Daniella Barrow, and Neil McManus.
4. The SurveyMonkey questionnaire was sent out to all ACES members and was closed on 26 October 2017.
5. Overall, we had 137 respondents, with an average survey completion time of just over 10 minutes.
6. The results, as raw data without any analysis, were circulated to ACES Council members via email from Keith Jewsbury on 31 October 2017. There are many insightful and informative contributions provided by members, which require detailed analysis and consideration.
7. A draft report was circulated to the Working Group on 27 November 2017.
8. **Executive summary**
9. The survey, although not suggesting any major changes, has clarified the objectives and role of ACES which can be used in promoting membership. It has endorsed the view of Council that ACES is fundamentally a 'peer to peer' members' association where the main reason for getting together is to help each other do their jobs through mutual support. It has also clarified the criteria and characteristics for ACES membership. A member should be a senior professional from a local authority, similar public-sector body or a company, either publicly or privately owned, contracted to deliver the majority of an estates function for a public-sector body. The member should be a person who is committed to being part of a community of professionals promoting excellence in the management of

the public-sector estate. They do not necessarily need to be a department head, but they do need to have sufficient authority to promote and represent both themselves, their public-sector body, and fellow professionals in that body. They need to have a strong public servant ethos and be willing to contribute to, as well as personally benefit from, membership of the Association.

10. There are a number of recommendations at the end of this report that Council are asked to consider and endorse.

11. Analysis of the SurveyMonkey responses, with some conclusions

Q1) Please indicate which sector(s) you represent or work for:

- Local authority 66%
- Retired 21%
- Other 13% consultant, public and third sector, health, fire/rescue/ambulance

12. Responses received from 137 members, with a high % of retired members responding.

13. Conclusion. ACES members still primarily work within local government. The Association relies heavily on support from retired members which, whilst greatly welcome, is a high-risk for the longevity of ACES and needs to be addressed.

Q2) Primarily ACES is a 'peer to peer' networking members' association where the main reason for getting together is to help each other do their jobs through mutual support. Do you agree that this should continue to be its main focus and role?

14. Just over 96% either strongly agreed (55.56%) or agreed (40.74%). Just one respondent disagreed.

15. Conclusion. This view is strongly endorsed, with membership being the individual who represents their local authority/public-sector body.

Q3) To what extent do you consider that the existing ACES objectives are relevant to the estate surveyor in the public sector:

a) Promote good asset and estates management in the interests of the community and public

- 97% either strongly agreed (60.58%) or agreed (36.5%)

b) Promote ACES as the first call for property advice and make recommendations to government, associations and institutions

- 85.29% either strongly agreed (41.91%) or agreed (43.38%); 5.89% disagreed

c) Meet and represent members interests and to disseminate information

- 96.3% either strongly agreed (58.52%) or agreed (37.78%)

d) Improve the public image of the profession

- 74.16% either strongly agreed (34.31%) or agreed (40.15%); 21.90% were neutral and 5.11% disagreed

16. Comments. ACES should focus on estate surveyors more generally rather than the senior estate surveyor, draft good practise guidelines, more generalist and private sector, some branches are under performing and need to consider objectives and organise better meetings, objective 4 is RICS remit but as they do not do it should remain ACES objective, objectives are fine and should remain.

17. Conclusions. All existing objectives are endorsed and should remain, although these are the shortened version on the website and should replace the ones currently in the constitution. Could delete in a) 'in the interests of community and public' as it is not an objective, it explains the reason for the objective, and replace with 'across the public sector through sharing innovation and best practise' to fit in with the OPE agenda and what ACES primarily does. Could add into c) to develop skills and expertise of members as providing CPD is considered to be an important role for ACES. Objective 5 in the actual constitution regarding seeking representation from every local authority and public-sector body etc. should also perhaps remain but be shortened.

Q4) What changes, if any do you consider should be made to these ACES objectives (in Q3) to reflect the way services are and will be delivered in the future:

- Increase ACES profile within public service; more 'value for money' objectives; represent and support all estate surveyors and valuers in the public-sector but ensure all members are heads of Department; consider digital working - remote conferencing; offer interim support services to authorities; emphasise CPD role; promote collaborative working across public sector.

18. Conclusions. Consideration be given to extending the objectives to reflect comments above, but the suggestions are more ways of delivering the existing objectives, so it would perhaps be better if they formed part of a delivery strategy.

**Q5) How important to you as a member of ACES are the following:
(percentages are combination of very important and important)**

- Branch meetings – 83.46%
- CPD events – 81.2%
- National Council meetings – 29.85%
- National Conference – 52.59%
- The Terrier/The Asset – 85.92%
- Website forum – 70.68%
- Website news, job adverts etc. – 44.03%
- National Council Coordinators – 36.09%
- Making individual network contacts via ACES – 91.11%
- Links with other government and public-sector organisations – 87.41%
- Consultation and lobbying – 74.08%

19. Comments. Responses to forum requests are disappointing, members should be encouraged to make more use of the forum.

20. Conclusions. All are important with National Council meetings, coordinators and website being the lowest. Promote role of coordinators, whose performance until recently has been very patchy with what they do not generally being shared with branches, and promote better use of the forum.

Q6) ACES operates efficiently through its website and printed output, but much of its work takes place at local meetings all over the country organised by its ten branches. Do you regularly attend and get involved in these meetings, so as to get full benefits of ACES membership for yourself and the organisation you represent?

- Yes – 72.26%
- No – 27.74%

If 'No' why not:

21. Comments. Retired member, so not relevant; too busy, so website needs to be more used and contacts made through social media; location and insufficient time to travel and attend full day meetings; some topics are a repeat of CIPFA courses; branch meetings are life and blood of ACES, but national meetings seem to be of higher importance to some members.

22. Conclusions. Promote benefits of attending branch meetings and demonstrate that they will actually achieve tangible benefits.

Q7) What do you consider to be the main benefits of ACES membership and provide examples:

23. The responses to this question has been grouped into headings as follows:
24. **Networking to share best practice and problems.** This is the benefit most mentioned.
25. **Profile.** Raise profile of local authority/public sector body and own profile with employer and property community. Being a member of ACES helps with introductions and negotiations particularly with the private sector. ACES award for excellence helps raise profile of individual winner and public body represented and is a good motivational tool.
26. **General support through branch meetings, forum and visiting other authorities.** Examples of areas where support given covered: Obtaining other peers views, finding specialists on a particular subject, asset management plans, valuation principally asset, rating, access to national comparables, property investment strategy, amp software, office rationalisation, agile working, corporate landlord, community asset transfer policy, rights of air valuation, presentation by Rightmove changes marketing policy, CPOs, EPCs, registered valuer scheme, recruitment, procurement of consultants, joined consortium to appoint rating consultants, cross authority working (collaboration), insurance benchmarking, leases for a charity, TRIG AMP guidance, training for non-property support staff, promoting work on health estates, promoting OPE and Single Estate Pathfinder work, Community Empowerment Act 2015.
27. **Terrier articles.** Help with policy development and negotiations.
28. **Policy.** Influence policy at government and RICS level. Early insight into policy agenda helps develop own strategy.
29. **Keeping up-to-date and ahead of the game.** Particularly with policy and legislative changes.
30. **CPD.** Provision of relevant affordable CPD at local level and at national conference
31. **Procurement of services.** From the private sector generally and a number of authorities for a joint rating consultancy. Learning from others who have outsourced. Not masking mistakes in appointing consultants saved £10s of thousands for Council.
32. **ACES best practice guides.** Guide to Rural Estate Asset Management.

33. Better understanding of the public-sector and role and challenges facing ACES colleagues.

34. Conclusions. Actively promote these benefits more widely to public sector organisations with no ACES membership.

Q8) Membership

a) Is it important that ACES continues to focus on being about and for the public sector?

- 93.43% either strongly agreed or agreed

b) Are you in favour of private sector estate surveyors/property consultants as individuals being allowed to join if they are primarily involved with public sector work?

- 60.59% either strongly agreed or agreed

c) Are you in favour of private sector companies being allowed to join as a separate membership class if they are involved with public sector work?

- 45.27% either strongly agreed or agreed

d) Should private sector individual members have voting rights?

- 36.76% either strongly agreed or agreed

e) If permitted to join are you in favour of any restriction on numbers of private sector estate surveyors relative to existing branch members?

- 51.85% either strongly agreed or agreed

35. Comments. These range from ACES will 'die' if it does not widen its membership, to a few members saying they will resign if ACES is opened up to the private sector. However, the overall view is ACES should be for the public sector and concerns about private sector being driven by expanding client base/fee income/profit rather than the public servant ethos. Private sector membership could change this focus. Concerns about discussing confidential issues with private sector present. Also, some respondents want ACES to remain just for local government. Those who do support opening up which is over 60% mainly want individuals only from private sector primarily involved with public sector work. One view is controls should be over agendas not numbers

Q9) In connection with questions 8 c) & 8 d) above, if you answered 'agreed' or 'strongly agreed' which of the following scenarios would you agree to allow a private sector company membership to ACES:

- Companies who deliver ad hoc public-sector work e.g. disposals/valuations – 25.84%
- Companies who are contracted to deliver the majority of an estates function for a public body – 94.38%
- Companies who have a contract to deliver part of a property function for a public-sector body e.g. asset valuations/rating work – 52.81%
- 64.47% responded to this question

36. Comments. The majority view is companies who are contracted to deliver the majority of an estates function to the public sector (94.38%) with those that deliver part of a property function (52.81%) being some way behind.

37. Conclusion. Although only 64.47% responded to this question over 60% of all respondents are in favour of membership from companies who are contracted to deliver the majority of the estates function for a public-sector body.

Q10) In connection with question 9 above, if you agreed to any of the examples should it still be the individual or the company N.B. ACES current criteria is that it is the individual

- Yes – still the individual – 85.58%
- No – extended to the company – 14.42%
- 76.55% responded to this question

38. Comments. The majority view is the individual as it will enable relationships to be developed that ensure the private sector surveyors involved in ACES activities are those who are genuinely committed to the public sector. Some respondents were not aware that they are the members of ACES rather than their authority. However, strong view that ACES is about individuals networking and so membership should be restricted to individuals with this ethos.

Q11) In connection with question 8 g) above, if permitted to join are you in favour of any restriction on numbers of private sector estate surveyors relative to existing members e.g. a maximum percentage of membership of each branch:

- Yes – 74.58%
- No – 25.42%
- 86.13% responded to this question

If “yes” what do you consider to be a maximum percentage?

- Between 0 and 10% – 32.55%;
- 11 and 20% – 12.79%;
- 21 and 30% – 19.76%;
- 31 and 40% – 13.95%;
- 41 and 50% – 8.14%
- Between 0 and 20% – 45.34%
- 62.77% responded to this question

39. Conclusions. Open up membership, but in a controlled way possibly excluding voting rights, to individuals from companies who are contracted to deliver the majority of an estates function for a public-sector body. This will bring membership into line with local authority owned companies that are already providing estates services in a big way i.e. NPS, Concertus, Place Partnership; private-sector companies specifically set up to provide services to the public sector i.e. CAPITA; and individual ACES members who have now left the public sector and set up their own consultancies to provide services for the public sector, all of which are now effectively driven by fee income/profit and also to varying extents provide services to the private sector. Suggest Council, through a small working group, produce special membership criteria for the private sector, and that membership is restricted to 20% for each branch, although with it being restricted in this way doubtful whether it will get anywhere near this percentage. Also, branches can control through management of agendas at meetings. Keep future membership from individuals from companies who deliver part of a property function under review.

Q12) Please suggest any ways you consider ACES could improve as a members' association in order to better achieve its objectives:

40. Raise profile within public sector hierarchy and with elected members; promote ACES more widely across the whole of the public sector as it is still mainly a local authority association; need a business plan with targeted objectives; Improve website and develop insurv type add on where examples of best practice can be located; more CPD at branch level and full day meetings; work closer with CIPFA and RICS, represent all estate surveyors not just 'Chief'; raise profile of President through national issues and articles; more articles from ACES in Estates Gazette, Property Week, RICS publications; more sharing of best practise across branches; increase number of conference but buy in support; more online content; increase younger membership; reduce level of branch fees and give discounts to new members; better use of social media such as LinkedIn and Twitter; have a light membership for colleagues in the public sector who are not surveyors e.g. solicitors who deal with property transactions; better use of modern technology; be less reliant on retired members support; on line video training; reinvigorate rural branch; work with DV to get access to comparables; widen access to property professionals across the public sector; more

opportunity for structured problem sharing; change name to Association of Surveyors in the Public Sector or something similar as there are often no longer Chief Estates Surveyors in public bodies.

41. Conclusions. Replace the existing ACES strap line with one that reflects the current role of ACES such as: 'Promoting and sharing innovation and best practice across the public-sector estate'. Council to develop a business action plan to promote the role and benefits of ACES membership and take on suggestions made.

Q13) Please indicate which ACES Branch you belong to:

- Scotland	9.02%
- North West	15.04%
- North East	9.02%
- Heart of England	11.28%
- Eastern	14.29%
- South East	12.78%
- London	15.04%
- South West	5.26%
- Wales	4.51%
- Rural	3.76%

Q14) Age

- 35 to 44 years	12.78%
- 45 to 54 years	32.33%
- 55 to 64 years	34.59%
- 65 to 74 years	16.54%
- 75 plus	1.5%
- Prefer not to say	2.26%

42. Recommendations

- a. Develop a plan of action to better promote the benefits of ACES membership to all local authorities. Key outcome is increasing membership, both individuals and authorities.
- b. Develop a plan of action to increase and broaden membership across the public-sector e.g. health sector.
- c. Produce an ACES communication & marketing strategy [link with Business Plan].
- d. Remain inclusive & welcoming for retired members but develop a plan of action to encourage working professionals to take active roles within ACES, both at Council and within branches.
- e. Age profile of ACES – develop a plan of action to actively encourage younger professionals to join and participate in ACES.
- f. ACES objectives – review to simplify.
- g. Promote the benefit of branches – ACES Council should be encouraged to invest funds in promoting the role and benefits of ACES towards increasing the numbers of ACES membership.
- h. Develop stronger links with the RICS and other professional bodies.
- i. Allow private-sector individuals who are primarily delivering public-sector work to join ACES but to have no voting rights.
- j. Allow private-sector companies who are primarily delivering public-sector work to join ACES but up to a maximum of 20% individuals for each branch.
- k. Produce a 3-year Business Plan.
- l. ACES President, Senior Vice-President, and Junior Vice-President – longer roles than one year?
- m. Succession planning – identify 2/3 suitable candidates for Junior Vice-President role.

Neil McManus BSc (Hons) MRICS
ACES President
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