

**London Borough of Croydon**  
**Estate Management & Valuation**  
**Services**

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## Contents

<b>1. Introduction</b>	3
<b>2. Background</b>	3
<b>3. General</b>	4
<b>4. Specification</b>	5
4.1 Residential Acquisitions for Social Housing - Valuations	5
4.2 Commercial valuation for acquisition and investment	7
4.3 General Valuation Advice for Commercial Property	9
4.4 Disposal of Land & Property	9
4.5 Estate Management services for commercial properties including rent reviews, lease renewals, easements, wayleaves and service charge advice	10
4.6 Development Consultancy and Strategic Property advice	12
<b>5 Sub-Contracting</b>	16
<b>6 Contract Management</b>	16
<b>7 Key Performance Indicators</b>	16
<b>Appendix 1</b> Schedule of the Council's Property and Telecoms Estate	

## 1. Introduction

London Borough of Croydon ('The Council') is seeking to appoint an accredited chartered surveying firm to provide a Valuation & Estate Management Advice service. The Service Provider shall deliver a professional Service for a range of residential and commercial building's including rent reviews, lease renewals, valuation advice, acquisition advice, advice on the disposal of land and property, building surveying and strategic asset management on behalf of the Council.

The Council implemented a 'Corporate Landlord Operating Model' in April 2016. The revised operating model has enabled the service to focus on continually improving asset utilisation and the efficient management of property related resources. The revised operating model means the Asset Management Team has a clear emphasis on strategic asset management tasks ensuring the Council's property estate is fit for purpose, efficient and supports the Council's core objectives and service delivery.

This procurement will lead to the appointment of a professional service Provider as a partner, to deliver a Valuation & Estate Management advice service that may be required on an ad hoc basis in relation to the Council's non-domestic property portfolio.

The appointed firm will be contracted to provide the services detailed for a period of 3 + 1 years.

## 2. Background

- 2.1 Croydon is London's southern-most borough, bordering Lambeth, Lewisham and Southwark to the north, Sutton, Merton and Surrey to the south. One of London's largest retail and commercial centres, Croydon has good rail, tram and road links and more than 120 parks and open spaces. With a population of 360,000, the borough has the largest population in London and experiences significant disparity in terms of socio-economic factors with some wards that are amongst the most deprived nationally, and others that rank as the least disadvantaged.
- 2.2 The Council owns and leases around 1000 property land and building assets that form the Corporate Property estate. Of the 1000 property assets around 250 are considered the core assets with a book value that would not be considered de-minimis. The HRA property estate comprises around 13,000 houses, flats and bungalows and 2,300 leasehold properties. There are also garages and small land holdings. The social dwellings comprise of:

Type of social housing dwelling	Volume
Bungalows	231
Houses	4,982
Flats	6,846
Maisonettes	1,417

- 2.3 The housing stock is owned and managed in-house across the People and Place departments. The age range of the property portfolio is varied, with the majority of homes built between 1950 and 1975. The Council undertake circa £28m of planned investment

and cyclical maintenance each year to the social house properties, in addition to £12m repairs and maintenance per annum.

2.4 The Council's Housing Asset Management Plan sets out four strategic objectives:

- Compliant, decent and energy efficient homes
- Homes in places where people want to live, work and socialise
- Residents of all ages and backgrounds shaping services
- Affordable and cost-effective homes

2.5 To give potential Tenderers and insight about Croydon, the link to the Croydon Observatory site <https://www.croydonobservatory.org/> contains useful information about the Council's Strategies and demographics.

### 3. General

- 3.1 The Service Provider shall provide a comprehensive Valuation & Estate Management advice service to the Council. The primary objective always shall be to ensure that the Council is professionally represented, policy and procedures are adhered to and that the Council achieves value for money.
- 3.2 The Service Provider shall undertake all tasks normally associated with a professional services contract, maintaining a sufficient level of resource to deliver the contract and to act in accordance with RICS guidance and best practice at all times. Using industry best practice and the introduction of innovation, the Service Provider will achieve and demonstrate value for money on a continuous basis and will report performance against targets, as and when requested by the Council.
- 3.3 The Service Provider shall be responsible for monitoring the provision of the Services on a regular basis to ensure a high-quality service is provided and in accordance with this Specification and the Contract. The Service Provider will nominate a single point of contact who will fulfil the role of a nominated account manager.
- 3.4 The Service Provider shall prepare a working schedule detailing the timeline and milestone dates to deliver each 'transaction' within the specified timeline (as detailed within this specification). The working schedule will be subject to review by the Council and may be subject to alteration as agreed.
- 3.5 From time to time the Council will be required to adjust the timing of certain transactions and tasks therein. The Service Provider shall be required to co-operate and assist the Council when these occasions arise. There shall be no additional cost to the Council when this occurs.
- 3.6 It is the sole responsibility of the Service Provider to ensure that all Health and Safety requirements are met in respect of all activities and inspections undertaken. The Service Provider shall inform the Council, in the first instance of any Health and Safety requirements and any breaches at the earliest opportunity together with a programme for rectification and measures to safeguard against a repeat to be discussed and agreed by the Council.

- 3.7 The Service Provider must be accredited by the Royal Institution of Chartered Surveyors (RICS). The Council reserves the right to terminate the Service Provider's contract if they fail to maintain their accreditation or allow it to lapse.
- 3.8 The Service Provider shall always comply with all relevant EC and UK statutory and legislative requirements, including any alterations to policy as may take place, and shall be the sole point of contact for any of the Council's concerns with that aspect of performance.
- 3.9 The Service Provider's staff will always carry photographic identification and will act professionally and courteously when carrying out their day to day tasks.
- 3.10 The Service Provider will be expected to uphold and adhere to the Council's 'Supplier Code of Conduct' as outlined in Volume 1 Invitation to Tender, Appendix 2.

## 4. Specification

### 4.1 Residential Acquisitions for Social Housing - Valuations

- 4.1.1 The Service Provider shall provide a professional sourcing, valuation and negotiation service to support the acquisition of residential properties. The properties will be sourced in accordance with the Council's instructions for either investment purposes or social housing purposes. The scope will include all residential property types such as flats, bungalows and houses.

#### **Residential Acquisitions – Sourcing Properties in accordance with Council requirements**

- 4.1.2 The Service Provider shall source suitable properties on behalf of the Council and in accordance with the requirements set out in the instruction that is received. The Service Provider will use a variety of methods for sourcing properties including (but not limited to) the use of local estate agent firms, mailshots, advertisements, auctions and online research. The Council as purchasing party will remain confidential until the purchase is agreed and solicitors are instructed.
- 4.1.3 Whilst the Sourcing of properties are for two different purposes; for investment opportunities (where the target outcome is a return on investment) and social housing (where the target outcome is to provide homes for residents), the process and procedure to be followed is the same. When a suitable property has been identified, the Service Provider shall contact the Council's appointed representative and submit the initial summary report. The format of the summary report is to be agreed during mobilisation and is to include an agreed valuation sign off methodology. On receipt of the summary report, the Council will review and provide further instructions, generally within 5 working days.
- 4.1.4 At all times during the sourcing process contact will strictly be between the primary Service Provider and the Council representative. The primary Service Provider may wish to sub contract services from time to time however the Council will not accept representation or contact from the Service Providers supply chain, property owners or their representatives.

#### **Residential Acquisitions – Valuation of Properties for Social Housing or Investment**

- 4.1.5 On instruction from the Council the Service Provider will provide a valuation report (as per current RICS guidelines) for the property identified as meeting their requirements.

4.1.6 The Council will also be sourcing suitable properties and as such, an instruction to provide a valuation report will be issued to the Service Provider accordingly.

4.1.7 The Service Provider is required to carry out the following activities and provide within their report for each instruction: -

- Arrange the appointment with the occupier,
- Inspect and value each property,
- Provide an external and internal photographic record,
- Provide adequate comparable evidence,
- Provide appropriate measurements in accordance with RICS guidelines,
- Provide comment and indicative cost relating to the condition of the property
- Provide a Land Registry compliant conveyancing plan(s),
- Provide the Valuation Report, signed by a RICS registered valuer

4.1.8 The Service Provider is required to produce valuations for all new instructions within 1 week (5 working days). A valuation report will need to be completed for each instruction.

4.1.9 The Service Provider will be required to submit and update reports to the Council as requested. It is anticipated that during high volume periods that this would be bi-weekly. The report will include as a minimum a list of all instructions received, date instruction received, status of instruction and expected submissions date.

4.1.10 The Service Provider will always follow the appropriate RICS procedures and guidance notes. The Service Provider is responsible for ensuring that their employees and sub-contractors are trained and aware of current best practice and any changes in policy.

#### **Residential Acquisitions – Negotiation to purchase Properties for Social Housing or Investment**

4.1.11 On instruction from the Council the Service Provider will negotiate with the vendor and agree a purchase price. Upon reaching an agreement the Service Provider will seek formal agreement from the Council in writing to approve the purchase and follow up in writing to the Council setting out the vendor's details and appointed solicitors.

4.1.12 As part of the instruction to negotiate the Council's representative will provide written guidance and parameters for the Service Provider to work within and in accordance with the Council's 'Supplier Code of Conduct'. The Service Provider will require written instructions to deviate from these parameters.

4.1.13 The Service Provider is required to carry out the following activities and provide within their report for each instruction: -

- Opening and subsequent offers to reach the agreed price,
- Vendor's details,
- Vendors appointed solicitor's details,
- Vendors representative details (if appropriate) i.e. Estate agent,
- Any other relevant information such as length of chain, vendors position, likely time to conclude transaction

## 4.2 Valuation for acquisition and investment

- 4.2.1 The Service Provider shall provide a professional sourcing, valuation and negotiation service to support the acquisition of commercial and residential properties. The scope of properties will include, but not be limited to residential, industrial, leisure, retail, office and land. The properties will be sourced in accordance with the Council's instructions for either investment purposes or development purposes.
- 4.2.2 The Council reserves the right to request a quantum based discount on the schedule of rates, where there are opportunities to place bulk orders for valuations during the contract term.

### Acquisition of Freehold & Leasehold Property

- 4.2.3 On instruction the Service Provider will receive a brief from the Council detailing their property requirements. The Service Provider will review the brief and raise any clarifications with the Head of Asset Management & Estates in writing. On the Council's behalf, the Service Provider will identify suitable properties that meet the Council's requirements and make initial enquiries as appropriate. The Council's identity at this stage should remain confidential.
- 4.2.4 On completion of the initial search the Service Provider will prepare a detailed report setting out the properties identified (including those deemed not to meet their requirements), their respective strengths and weaknesses and any other information that may influence the Council's decision. This should include, but not be limited to, strategic investment advice and the identification of any surveys or further due diligence that may be required to make an evidence based decision.
- 4.2.5 On instruction from the Council the Service Provider shall then undertake a site inspection and if appropriate, measure the property to ensure that any areas being quoted are accurate. Photographs should be taken, and site plans prepared accordingly. The Service Provider will provide an initial report covering all significant facts, setting out actions, negotiating strategies and anticipated outcomes. This should be submitted to the Council for review. The report should also include strategic investment advice and the identification of any surveys or further due diligence that may be required to make an evidence based decision. The Council will then confirm instructions based upon the advice in this report.
- 4.2.6 On receipt of the Council's instruction the Service Provider will manage all negotiations through to the agreement of heads of terms. This will include the provision of a final report including a recommendation to the Council for agreement. The advice included therein will take full account of the Council's best interest, the statutory position, the overall condition of the site / building and the market. For the avoidance of doubt, the Service Provider will be responsible for the following: -
- Arranging an appointment to inspect the property (with the Council's representative in attendance if requested)
  - Providing comparable evidence within the final report
  - Measuring the building
  - Provision of photographs
- 4.2.7 Where an agreement cannot be reached, the Service Provider will provide a report to the Council setting out the proposed course of action for agreement. The advice included therein

will take full account of the Council's best interest, the statutory position, the overall condition of the building and the market.

4.2.8 Where specialist advice may be required or deemed appropriate this will be instructed in line with the appropriate schedule of rates. Any further work must be approved by the Council prior to commencement. At all times, sub-contractors are the responsibility of the primary Service Provider and the Service Provider will be responsible for ensuring that the appropriate professional qualifications and insurance policies are in place.

4.2.9 The Service Provider will always follow the appropriate RICS procedures and guidance notes. The Service Provider is responsible for ensuring that their employee's and / or sub-contractors are trained and aware of current best practice and any changes in policy.

#### **Acquisition of Freehold & Leasehold Property – Compulsory Purchase**

4.2.10 From time to time the Council will instruct the Service Provider to provide valuation advice and services to support the acquisition of sites and buildings on behalf of the Council as part of a Compulsory Purchase Order. The Service Provider will be required to provide strategic and procedural advice on all stages of the acquisition process and provide all services in accordance with the relevant RICS Guidance Notes and best practice statements. The Service Provider will be required to value each site and submit a detailed report to the Council. The Council will provide full contact details, an address and any correspondence that may be affect the valuation and process.

4.2.11 The Service Provider will contact the property owner and shall then undertake a site inspection and if appropriate measure the property to ensure that any areas being quoted are accurate. Photographs should be taken, and site plans prepared accordingly. The Service Provider will provide an initial report covering all significant facts, setting out actions, negotiating strategies and anticipated outcomes. This should be submitted to the Council for review. The Council will then confirm instructions based upon the advice in this report.

4.2.12 On receipt of the Council's instruction the Service Provider will manage all negotiations through to conclusion. This will include the provision of a final report including a recommendation to the Council for agreement. The advice included therein will take full account of the Council's best interest, the statutory position, the overall condition of the building and the market. For the avoidance of doubt, the Service Provider will be responsible for the following: -

- Arranging an appointment to inspect the property
- Providing comparable evidence within the final report
- Measuring the building
- Provision of photographs

4.2.13 Where an agreement cannot be reached, the Service Provider will provide a report to the Council setting out the proposed course of action for agreement. The advice included therein will take full account of the Council's best interest, the statutory position, the overall condition of the building and the market.

4.2.14 Where specialist advice may be required or deemed appropriate the Council will instruct the Service Provider in accordance with the appropriate schedule of rates. Any further work must be approved by the Council prior to commencement. At all times, sub-contractors are the responsibility of the Service Provider and the Service Provider will be responsible for ensuring that the appropriate professional qualifications and insurance policies are in place.



- 4.2.15 The Service Provider will always follow the appropriate RICS procedures and guidance notes. The Service Provider is responsible for ensuring that their employee's and / or sub-contractors are trained and aware of current best practice and any changes in policy.

### **4.3 General Valuation Advice - All Properties**

- 4.3.1 The Service Provider shall provide a professional valuation service to support the Council's day to day service activities and the delivery of projects. The scope of services will include, but not be limited to, valuation advice for the transfer of land, valuation advice to inform business cases for strategic acquisitions or disposals and valuations to inform development appraisals and opportunities. The advice will be for all property types and will include both property owned and leased by the Council and property that may be owned by a third party.
- 4.3.2 The Council will from time to time instruct the Service Provider to provide general valuation advice to assist with options appraisals and general day to day matters (including, but not limited to disposal guidance, income generating opportunities and releasing of restrictive covenants or granting of alternative use).
- 4.3.3 On instruction the Council will provide full address details, occupation information and a brief of how the valuation will be used and a timeframe for the completion of the valuation report and details of what should be included.
- 4.3.4 The Service Provider will always follow the appropriate RICS procedures and guidance notes. The Service Provider is responsible for ensuring that their employee's and / or sub-contractors are trained and aware of current best practice and any changes in policy.
- 4.3.5 On completion of each valuation the Service Provider is required to submit a full report including a site plan identifying the boundary and any rights of way, a photograph of the property, details of any assumptions made and a record of the comparable evidence used to arrive at the valuation. The report should also include any perceived risks or issues that may affect the validity of their report or that the Council should be aware of.

### **4.4 Disposal of Land & Property**

- 4.4.1 On instruction the Service Provider will receive a brief from the Council setting out the proposed site and buildings for disposal. The brief will contain a full address and site plan setting out the Council's ownership. The Council will also include any information relating to any third-party interest including wayleaves, easements and rights of way. The Service Provider is required to review the information and raise any clarifications with the Head of Asset Management in writing.
- 4.4.2 The Service Provider shall undertake a site inspection and if appropriate measure the property to ensure that any areas being quoted are accurate. Photographs should be taken, and site plans prepared accordingly. The Service Provider will provide an initial valuation report covering all significant facts, setting out actions, marketing strategies and anticipated value of receipt. The valuation report will consider all alternative uses for the site and likely change to the level of receipt should the Council seek alternative use or planning permission prior to marketing. The report will also include anticipated outcomes taking in to consideration market conditions and risks.
- 4.4.3 The Service Provider shall set out a recommendation as to the most appropriate method of disposal. All methods should be considered and the rationale for not selecting a method

shall be detailed within the report The Council will then review this report and confirm the next steps to be taken.

4.4.4 On receipt of the Council's instruction the Service Provider will manage all marketing, viewings, enquires and negotiations (if appropriate) through to conclusion. This will include the provision of a final report detailing all the offers received (prior to and after the submission deadline) including a recommendation that considers all aspects of the bid including covenant strength, financial viability and deliver of the proposed scheme or development (if relevant and appropriate) to the Council of which offer to proceed with. The advice included therein will take full account of the Council's best interest, the statutory position and market conditions. This should be submitted to the Council for review. For the avoidance of doubt, the Service Provider is responsible for the following: -

- Arranging all marketing and advertising (the Council will pay for the cost of marketing separate to the fee for professional services and all costs must be approved in advance of instructions being made)
- Making appointments for viewings
- Managing all enquiries
- Due diligence of prospective purchasers
- Receiving sealed bids in accordance with the Council's policy and procedures (available on request) and attending the Council's offices to open sealed bids

4.4.5 Where the Service Provider is required to provide specialist advice the Council as purchasing party will remain confidential until the purchase is agreed and solicitors are instructed. The Council will instruct this in writing and in accordance with the appropriate schedule of rates. Any further work must be approved by the Council prior to commencement. At all times, sub-contractors are the responsibility of the Service Provider and the Service Provider will be responsible for ensuring that the appropriate professional qualifications and insurance policies are in place.

4.4.6 The Service Provider will always follow the appropriate RICS procedures and guidance notes. The Service Provider is responsible for ensuring that their employee's and / or sub-contractors are trained and aware of current best practice and any changes in policy.

## **4.5 Commercial Estate Management Services**

4.5.1 The Service Provider shall provide a professional Estate Management service to support the Council's day to day service activities and the delivery of projects. The scope of services will include, but not be limited to, general estate management advice including the letting of non-domestic property assets and land, rent review and lease renewal transaction services and ad hoc advice relating to lease variations. The advice will be for commercial property assets and will include both property where the Council is the landlord and the tenant. The scope of properties will include, but not be limited to, retail units, leisure, industrial, office and telecom masts and advertising rights and units.

### **Rent Review – Council as Landlord or as Tenant**

4.5.2 On instruction the Service Provider will receive a copy of the existing commercial lease documents (including lease plan) from the Council. The Service Provider is required to review the lease and ensure that they are familiar with all the relevant clauses and provisions within the lease. The Council will also provide to the Service Provider a copy of any notices or correspondence received from the landlord or tenant. The rent review shall

be conducted in accordance with the relevant and appropriate RICS guidance notes and instructions.

4.5.3 The Service Provider shall undertake a site inspection and if appropriate measure the property to ensure that any areas being quoted are accurate. Photographs should be taken as appropriate and site plans prepared accordingly. The Service Provider will provide an initial report covering all significant facts, setting out actions, negotiating strategies and anticipated outcomes. The Council will then review this report and confirm the next steps to be taken.

4.5.4 On receipt of the Council's instruction the Service Provider will manage all negotiations (if appropriate) through to conclusion. This will include the provision of a final report including a recommendation to the Council for agreement. The advice included therein will take full account of the Council's best interest, the statutory position, the overall condition of the building and the market. This should be submitted to the Council for review. For the avoidance of doubt, the Service Provider is responsible for the following: -

- Arranging an appointment to inspect (with the tenant or Council department in occupation)
- Providing comparable evidence
- Negotiating directly with the tenant or landlord on the Council's behalf in accordance with the Council's instructions, RICS Guidance notes and best practice
- Obtaining a signed rent review memorandum from the tenant or Head of Asset Management

4.5.5 Where an agreement cannot be reached, the Service Provider will provide a report to the Council setting out the proposed course of action for agreement. The advice included therein will take full account of the Council's best interest, the statutory position, the overall condition of the building and the market.

4.5.6 Where further action is deemed appropriate or expert advice is required this will be instructed in line with the appropriate schedule of rates. Any further work must be approved by the Council prior to commencement.

4.5.7 The Service Provider will always follow the appropriate RICS procedures and guidance notes. The Service Provider is responsible for ensuring that their employee's and / or sub-contractors are trained and aware of current best practice and any changes in policy.

#### **Lease Renewal – Council as Tenant or as Landlord**

4.5.8 On instruction the Service Provider will receive a copy of the existing commercial lease document (including lease plan) from the Council. The Service Provider is required to review the lease and ensure that they are familiar with all the relevant clauses and provisions within the lease. The Council will also provide to the Service Provider a copy of any notices or correspondence received from the landlord or tenant.

4.5.9 The Service Provider shall undertake a site inspection and if appropriate measure the property to ensure that any areas being quoted are accurate. Photographs should be taken as appropriate and site plans prepared accordingly. The Service Provider will provide an initial report covering all significant facts, setting out actions, negotiating strategies and anticipated outcomes. This should be submitted to the Council for review. The Council will then confirm instructions based upon the advice in this report.

4.5.10 On receipt of the Council's instruction the Service Provider will manage all negotiations through to conclusion. This will include the provision of a final report including a recommendation to the Council for agreement. The advice included therein will take full account of the Council's best interest, the statutory position, the overall condition of the building and the market. For the avoidance of doubt, the Service Provider will be responsible for the following: -

- Arranging an appointment to inspect the property (with the tenant or Council department in occupation)
- Providing comparable evidence within the final report
- Measuring the building and preparation of Land registry compliant lease plans
- Provision of photographs

4.5.11 Where an agreement cannot be reached, the Service Provider will provide a report to the Council setting out the proposed course of action for agreement. The advice included therein will take full account of the Council's best interest, the statutory position, the overall condition of the building and the market.

4.5.12 Where further action is deemed appropriate or expert advice is required this will be instructed in line with the appropriate schedule of rates. Any further work must be approved by the Council prior to commencement.

4.5.13 The Service Provider will always follow the appropriate RICS procedures and guidance notes. The Service Provider is responsible for ensuring that their employee's and / or sub-contractors are trained and aware of current best practice and any changes in policy.

#### **Letting of Commercial Property on behalf of the Council as Landlord**

4.5.14 The Service Provider will provide an end to end letting service on behalf of the Council. This will include the preparation of marketing documents, advertising (both through the Council website and other media outlets to be agreed), viewings, agreement of heads of terms and preparation of Land Registry compliant lease plans.

4.5.15 The Service Provider will also be required to test business viability and complete credit checks in line with Council policy and procedure and data protection laws.

4.5.16 In order that the process is fully transparent, and that the Council maintains mixed parades that support communities, the Service Provider will carry out all marketing and letting in line with the Council's "Shops Policy" and "Property Procedure for Disposal & Letting".

4.5.17 For the avoidance of doubt, any advertising (other than through the Council's or the Service Provider's website) requested by the Council will be recharged to the Council at cost price.

4.5.18 The Service Provider to advise the Council of interest and bids of relevance for review as part of their recommendation to proceed with a new letting.

#### **4.6 General Valuation, Commercial Estate Management, Development Consultancy & Strategic Property Advice**

### **Development Consultancy Advice**

- 4.6.1 The Council will from time to time instruct the Service Provider to provide development consultancy advice. Feasibility studies will be prepared and will include options for the re-use of sites to support Council objectives, redevelopment for financial return and disposal to achieve capital receipts.
- 4.6.2 On instruction the Council will provide full address details, occupation information and a brief of how the advice will be used and a timeframe for completion.
- 4.6.3 The Service Provider will be required to submit to the Council a written response to the instruction setting out their understanding the brief, the services that will be required to deliver the advice, a resource plan with costs from the schedule of rates and a detailed timetable for delivery.
- 4.6.4 Where specialist advice may be required or deemed appropriate this will be included within the main submissions and the cost structured in line with the appropriate schedule of rates. At all times, sub-contractors are the responsibility of the Service Provider and the Service Provider will be responsible for ensuring that the appropriate professional qualifications and insurance policies are in place.
- 4.6.5 The Service Provider will always follow the appropriate RICS procedures and guidance notes. The Service Provider is responsible for ensuring that their employee's and / or sub-contractors are trained and aware of current best practice and any changes in policy.
- 4.6.6 On completion of each instruction the Service Provider is required to submit a full report including a site plan identifying the boundary and any rights of way, details of any assumptions made and a record of the comparable evidence used to arrive at the options and recommendations.

### **Strategic Property Advice**

- 4.6.7 From time to time and on instruction from the Council the Service Provider will be required to provide strategic property advice to the Council. The type of requests could include, but not be limited to: -
  - Development and / or contribution to property related policies and strategies
  - Medium to long asset & estate planning advice
  - Strategic options appraisals and cost advice
  - Strategic service & resource planning relating to all property matters
  - Benchmarking including data gathering, analysis and presentation
  - Strategic procurement advice relating to all property matters
  - Disposal programmes and strategies
  - Portfolio and site reviews
  - Regeneration advice
  - Architectural advice (general or scheme specific)
- 4.6.8 All instructions from the Council will be made in writing and include a scope of the advice required, context and reason for the request. Correspondence may be via e-mail and prior to advice being provided the instructing officer will confirm payment terms.

- 4.6.9 Charges for general advice will be in line with the appropriate schedule of rates, and the Service Provider will confirm the level of professional grade required to provide the advice accordingly and will not proceed without written confirmation from the instructing officer.
- 4.6.10 Whenever advice is sought the Council will endeavour to provide as much information as possible, including copies of legal documentation (lease documents, copies of plans etc.) and correspondence (if appropriate). On instruction, the Council will also ensure that the Service Provider is provided with Council policy and procedure, in order that this is taken into account when providing advice.
- 4.6.11 At all times the Service Provider will act in the best interest of the Council and ensure that the advice being provided is well researched, sound and evidence based. The advice being provided will adhere to RICS guidance and best practice and will in no way compromise the Council or breach EU or UK law.
- 4.6.12 Where specialist advice may be required or deemed appropriate this will be instructed in line with the appropriate schedule of rates. Any further work must be approved by the Council prior to commencement. At all times sub-contractors are the responsibility of the Service Provider and the Service Provider will be responsible for ensuring that the appropriate professional qualifications and insurance policies are in place.
- 4.6.13 The Service Provider will always follow the appropriate RICS procedures and guidance notes. The Service Provider is responsible for ensuring that their employee's and / or sub-contractors are trained and aware of current best practice and any changes in policy.

#### **General Estate Management Advice for Commercial Property Assets – Council as Landlord or as Tenant**

- 4.6.14 From time to time and on instruction from the Council the Service Provider will be required to provide general estate management advice or process requests on the Council's behalf. The type of requests could include, but not be limited to: -
- Assignments
  - Change of Use
  - Sub-letting
  - Consent requests
  - Service charge advice
  - Claims
  - Boundary disputes
  - Advice on breaches
  - Alienation
  - General consents
  - Dilapidations
  - Rent arrears and debt management
- 4.6.15 All instructions from the Council will be made in writing and include a scope of the advice required, context and reason for the request and the level of resource and respective level of seniority that the Council believe is appropriate to undertake the

task. Correspondence may be via e-mail and prior to advice being provided the instructing officer will confirm payment terms.

- 4.6.16 The Service Provider will respond in writing to the Councils instruction, setting out their understanding of the brief, the proposed resource and respective seniority of the resource and a clear fee including how the fee has been arrived at using the appropriate schedule of rates.
- 4.6.17 Whenever advice is sought the Council will endeavour to provide as much information as possible, including copies of legal documentation (lease documents, copies of plans etc.) and correspondence (if appropriate). On instruction, the Council will also ensure that the Service Provider is provided with Council policy and procedure, in order that this is considered when providing advice.
- 4.6.18 At all times the Service Provider will act in the best interest of the Council and ensure that the advice being provided is well researched, sound and evidence based. The advice being provided will adhere to RICS guidance and best practice and will in no way compromise the Council or breach EU or UK law.
- 4.6.19 The Service Provider will always follow the appropriate RICS procedures and guidance notes. The Service Provider is responsible for ensuring that their employee's and / or sub-contractors are trained and aware of current best practice and any changes in policy

### **Building surveying including dilapidations, claims and general advice**

- 4.6.20 The Council will from time to time instruct the Service Provider to provide general building surveying advice to assist with options appraisals, asset valuations and general day to day matters. The instructions may be on behalf of the Council as the landlord or tenant. The range of services required may include (but not be limited to):
- Party wall advice
  - Condition Surveys
  - Dilapidation surveys and advice
  - Maintenance advice including the preparation of programmes and replacement options
  - Technical advice including policy and strategy development and procurement support
  - Project management
- 4.6.21 On instruction the Council will provide full address details, occupation information and a brief of how the advice will be used and a timeframe for completion.
- 4.6.22 The Service Provider will be required to submit to the Council a written response to the instruction setting out their understanding of the brief, the services that will be required to deliver the advice, a resource plan with costs from the schedule of rates and a detailed timetable for delivery.
- 4.6.23 The Service Provider will always follow the appropriate RICS procedures and guidance notes. The Service Provider is responsible for ensuring that their employee's and / or sub-contractors are trained and aware of current best practice and any changes in policy.

- 4.6.24 Where specialist advice may be required or deemed appropriate this will be included within the main submissions and the cost structured in line with the appropriate schedule of rates. At all times sub-contractors are the responsibility of the Service Provider and the Service Provider will be responsible for ensuring that the appropriate professional qualifications and insurance policies are in place

## 5 Sub-Contracting

- 5.1 The Council will only allow sub-contracting in circumstances where specialist services are required, or special circumstances exist. Where sub-contracting is required this will only be allowed with explicit authority from the Council (in writing) in advance of an appointment.
- 5.2 The Service Provider will include all sub-contractors costs as separate items on the monthly invoice, stating the nature of the activity and hours worked and against the appropriate schedule of rates.
- 5.3 All sub-contractors will be required to sign a Non-Disclosure Agreement.

## 6 Contract Management

- 6.1 In order to ensure that the Contract operates in a successful and efficient way, as well as delivering all outcomes described in this Specification to the correct standards, the Service Provider will be required to attend regular meetings with the Council to monitor performance.
- 6.2 The Service Provider will be required to attend monthly operational meetings which will be held between the Service Provider and the Council. In addition, there will be quarterly Contract performance partnership meetings where all KPI's and performance matters are to be reviewed and will be held between the Service Provider and the Council.
- 6.3 The Service Provider is to provide to the Council an account lead or contract manager. This will be the person responsible for managing the performance of the Service Provider, their employees and resolving an issues or complaints and will be the recipient of all instructions to act on behalf of the Council.
- 6.4 The Service Provider is to provide to the Council details for their proposed contract manager. This will be the person responsible for managing the performance of the service Provider, their employees and resolving an issues or complaints and will be the recipient of all instructions to act on behalf of the Council.

## 7 Key Performance Indicators

- 7.1 The Service Provider and the Council will agree a set of Key Performance Indicators to support the management of the Contract.
- 7.2 KPI performance will be reviewed on a monthly basis with reports provided to the Council by the appointed supplier.



- 7.3 The Council reserves the right to update and amend KPI's as required to support performance improvement and innovation.

## **Appendix 1 Schedule of the Council's Property and Telecoms Estate**

**Please see attachment titled 'Appendix 1 Schedule of the Council's Property and Telecoms Estate'**