



# **VALUATION SERVICES STANDARDS POLICY STATEMENT**

**CONTRACTS AND PROPERTY**

**RESOURCES AND TRANSFORMATION  
DIRECTORATE**



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## 1.1 VALUATION SERVICES - STANDARDS POLICY STATEMENT

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#### 1. Scope

## 1.1 VALUATION SERVICES - STANDARDS POLICY STATEMENT

- 1.1. This document sets out the activities to be carried out by the valuation section and defines the level of quality to be provided.
- 1.2. The services shall be carried out in accordance with the following Council documents:
  - Contract Procedure Rules: <http://www.copelandbc.gov.uk/default.aspx?page=9>
  - Financial Regulations: <http://www.copelandbc.gov.uk/default.aspx?page=9>
  - Equality and Diversity: <http://www.copelandbc.gov.uk/default.aspx?page=558>  
1.1.1
  - Whistleblowing: <http://www.copelandbc.gov.uk/default.aspx?page=583>
- 1.3. The services shall also be carried out in accordance with the Council Corporate Plan as updated from time to time and shall accord with the Council objectives.
- 1.4. It is recognised that external services may be required from time to time, provision is made in the valuation services budget for this facility and suitable consultants will be asked to bid in competition for provision of these services. The extent of the services shall be agreed with your line manager, and the expenditure shall be properly monitored.

## 2. Property Related Information

- 2.1. Provide and maintain records of all Authority property keeping it up to date when changes occur so that it may be used for work in conjunction with your line manager's Asset Register, with all information readily available for your line manager.
- 2.2. Provide, maintain and utilise records for the Terrier, Vacant Land Register, capital receipts, plans & maps, lettings registers, service charges, land and building areas, budgets etc. available to your line manager and the public as required.
- 2.3. Maintain in an agreed format up to date plans, maps and the like for easy retrieval as and when required by your line manager.
- 2.4. Co-ordinate and integrate as appropriate information systems to improve total retrieval of all information on individual properties and groups of properties, with all information available to your line manager.
- 2.5. Comply with all current data protection requirements.
- 2.6. Respond positively and quickly to all reasonable ad hoc queries and requests for information relating to Authority owned/used property.
- 2.7. Produce location plans where associated with any commission.
- 2.8. Provide trigger dates to your line manager for initiation of rent reviews and lease renewals.
- 2.9. Advise your line manager of obligations and liabilities related to the tenure of property.

## 3. Property Review

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3.1. Contribute to your line manager's progress of the general and ongoing review of its property holdings by:

3.1.1. Attending property review meetings (at least monthly).

3.1.2. Undertaking actions agreed at those meetings to the agreed timescales.

3.1.3. Pro-actively seek and advise upon property review opportunities.

3.1.4. Advise on the need for site investigations (and carry them out as required subject to an additional fee).

3.1.5. Carry out studies of user requirements.

3.1.6. Liaise with your line manager and with Building Users in order to assess needs.

## **4. Asset Planning**

4.1. Provide Performance Indicators annually to enable completion of the Strategic Asset Management Plan, and ongoing updates.

4.2. Provide advice and statistics for Asset Management Planning, Capital Strategy and Reports to Authority Committees

## **5. Existing Records**

5.1. Maintain the historical records of the Council electronically. Maintain updated information retrieved from Capita electronically. Ensure this information is backed up. Continue to maintain and update records, retention and availability of information and forward planning of events and the like. (It is intended that the council will join the County Council terrier at some point in the future – target 2013/4 – at which point this information will be transferred).

## **6. Scope**

6.1. The Contractor shall provide the following property advice related services as either a percentage fee based on the capital receipt or as a charge based on time taken to complete the work. Your line manager preference is identified in the description of the service.

## **7. Property Sales**

7.1. In general:

7.1.1. Advice to your line manager on marketing and to achieve the sale of Authority property, as and when it becomes surplus to requirements.

7.1.2. Dealing with all ancillary property matters arising, including the negotiation of easements, wayleaves, rights of way, etc., surrenders of interests, service of relevant Notices, investigations of title, legal, planning and highway access issues, and all interim property management matters which arise pending the completion of the disposal or otherwise of the property.

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- 7.1.3. Some of these areas of work may give rise to a need for external support which will incur additional fees.
- 7.1.4. Marketing property, including placing advertisements in the press in an efficient manner, reviewing advising your line manager if repeat advertisements are recommended.
- 7.1.5. Provision, erection and maintenance of boards, removal, and preservation for re-use. Advising your line manager of supplies of boards, maintaining adequate for use without delay.
- 7.1.6. Prepare, manage, and monitor agreed surplus property budgets and all expenditure incurred under these budgets, after authorisation by your line manager.

## 7.2. Specifically:

- 7.2.1. Provide information for your line manager to use in consultations and discussions with Local Members and relevant Committee(s) and others.
- 7.2.2. Inspect and measure property.
- 7.2.3. Provide valuation and identify a guide price.
- 7.2.4. Liaise and co-ordinate with other parties as necessary, both within and external to your line manager.
- 7.2.5. Recommend on planning/legal considerations. (Planning and Development or Legal issues subject to time charge).
- 7.2.6. Advise on marketing strategy in consultation with your line manager.
- 7.2.7. Prepare particulars.
- 7.2.8. Advertise
- 7.2.9. Take enquiries and arrange viewing.
- 7.2.10. Report to your line manager when offers are received or periodically on the sale's progress with advice for the ongoing marketing strategy.
- 7.2.11. Negotiate a sale price and other terms by private treaty or sealed offer.
- 7.2.12. Instruct the Authority's solicitor.
- 7.2.13. Monitor progress until contracts exchanged.
- 7.2.14. Re-market if sale does not proceed after consultation with your line manager (interim billing of fees would be considered as well as reasonable fees for additional work).

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7.2.15. At appropriate times follow up and, within reason enforce covenants imposed.

## 8. Acquisitions

8.1. In general:

8.1.1. Advise upon acquiring specific property or property rights on the best terms as and when instructed by your line manager

8.1.2. Ensure that land, buildings and other interests acquired are suitable for the purpose or function intended.

8.2. Specifically:

8.2.1. Inspect and measure property

8.2.2. Make enquiries as to tenure, services, planning permission, etc. (Planning and Development or Legal issues subject to time charge).

8.2.3. Provide valuations and advice to your line manager.

8.2.4. Negotiate terms in consultation with your line manager.

8.2.5. Provide a report to your line manager.

8.2.6. Instruct the Authority's solicitor.

8.2.7. Monitor progress to contract stage.

8.2.8. Undertake related compensation cases, easements, wayleaves, etc.

## 9. Leases and Licences: Basic Services

### 9.1. Taking Leases and Licences

#### 9.1.1. General

9.1.1.1. Advise on forthcoming lease renewals / terminations in good time.

9.1.1.2. Dispose of and acquire leases of specified property on the best terms for your line manager suitable for the purpose or function intended as and when instructed by your line manager.

#### 9.1.2. Specifically

9.1.2.1. Inspect and measure the property.

9.1.2.2. Make enquiries as to services, planning permission, etc.,

9.1.2.3. Provide valuations and advice to your line manager identifying the proposed rental and terms.

9.1.2.4. Negotiate terms in consultation with your line manager.

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- 9.1.2.5. Provide a report to your line manager
- 9.1.2.6. Instruct your line manager's solicitor
- 9.1.2.7. Ensure instructions for rental payments etc. are made from appropriate date.
- 9.1.2.8. Undertake and agree a record of condition where necessary (through property maintenance section).
- 9.1.2.9. Monitor progress to completion.
- 9.1.2.10. Ensure Lettings and Assets Registers etc. are updated

## 9.2. Granting Leases & Licences

### 9.2.1. Specifically

- 9.2.1.1. Inspect and measure the property.
- 9.2.1.2. Provide valuations and advice to your line manager identifying the market rental and terms.
- 9.2.1.3. Prepare particulars as necessary.
- 9.2.1.4. Advertise as necessary.
- 9.2.1.5. Take enquiries and arrange viewing.
- 9.2.1.6. Take offers and consult with your line manager.
- 9.2.1.7. Negotiate terms in consultation with your line manager.
- 9.2.1.8. Provide a report to your line manager
- 9.2.1.9. Instruct the Authority's solicitor.
- 9.2.1.10. Ensure instruction for rental invoices etc, are made from appropriate date.
- 9.2.1.11. Undertake and agree a record of condition where necessary (through property maintenance section).
- 9.2.1.12. Monitor progress until lease documents complete.
- 9.2.1.13. Re-market if lease does not proceed.
- 9.2.1.14. Ensure Lettings and Asset Registers etc. are updated.

## 10. Rent Review

- 10.1.1. Advise on and undertake rent reviews of leased in and out properties in good time in accordance with the terms of each lease, as and when instructed by your line manager.
- 10.1.2. Inspect and measure the property.
- 10.1.3. Undertake enquiries in accordance with lease terms and serve appropriate notices and counter notices in good time.

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- 10.1.4. Prepare valuations and advice for consultation with your line manager.
- 10.1.5. Negotiate rental
- 10.1.6. Agree new rent after consultation with your line manager
- 10.1.7. Instruct the Authority's solicitor
- 10.1.8. Monitor progress
- 10.1.9. If agreement falls through, advise your line manager with adequate information for a decision on whether to renegotiate or proceed to arbitration, etc.
- 10.1.10. Ensure Lettings Register etc is updated and new rental payments made/invoices sent.

## 11. Seeking Property for Lease

- 11.1.1. Provide advice to your line manager on the necessity to acquire properties. new
- 11.1.2. Provide a property search service to identify suitable properties as may be required by your line manager.
- 11.1.3. Arrange entry onto mailing lists for the appropriate types of property.
- 11.1.4. Check local and national advertising.
- 11.1.5. View suitable properties.
- 11.1.6. Provide advice to your line manager on the merits or otherwise of best suited properties, including the cost of alteration refurbishment, etc. repairs,
- 11.1.7. Ensure that the properties identified are suitable for the purpose or function intended.
- 11.1.8. Arrange viewing with your line manager.
- 11.1.9. Provide planning / use implications.
- 11.1.10. Provide a report to your line manager.
- 11.1.11. Take instructions regarding the purchase or lease.

## 12. Lease Renewal

- 12.1.1. Inspect and measure the property.

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- 12.1.2. Provide valuation advice and recommendations to your line manager.
- 12.1.3. Serve appropriate notices, or counter notices with Legal Services.
- 12.1.4. Negotiate terms in consultation with client.
- 12.1.5. Report as necessary.
- 12.1.6. Instruct the Authority's solicitor.
- 12.1.7. Ensure instructions passed to client for revised rent collection and advice of any new terms
- 12.1.8. Monitor to completion.
- 12.1.9. Update lettings and asset registers.
- 12.1.10. Any court or arbitration works to be undertaken for a time charge fee.

## 13. Dilapidations

- 13.1. In general
  - 13.1.1. The Valuer shall notify and undertake dilapidation surveys and evaluations when appropriate upon a lease termination and dealing with all matters arising; as and when instructed by your line manager (in conjunction with property maintenance section).
- 13.2. Specifically
  - 13.2.1. Inspect the premises, the relevant lease terms and the schedule of condition.
  - 13.2.2. Prepare the necessary schedule of dilapidations (engage and pay for specialist advice where necessary).
  - 13.2.3. Serve the relevant notices and schedules on tenants (or receive and respond to the notices where your line manager is tenant).
  - 13.2.4. Negotiate claims.
  - 13.2.5. Liaise with your line manager.
  - 13.2.6. Agree terms and co-ordinate contracts for work (charges to manage the works contracts are additional).

## 14. Valuations

- 14.1. The Valuer shall undertake the following:

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- 14.1.1. Confirm the purpose of the valuation with your line manager, including principal terms, conditions, assumption, basis of valuation and alternative valuations, where relevant.
- 14.1.2. Inspect and measure property
- 14.1.3. Make planning, development and other enquiries.
- 14.1.4. Undertake valuations and prepare written valuation reports.

## 15. Asset Valuations

- 15.1. The Valuer shall undertake the following:
  - 15.1.1. Inspect and measure each property.
  - 15.1.2. Undertake written valuations (asset value and market value) in accordance with RICS and CIPFA guidelines.
  - 15.1.3. Provide a schedule of valuations and associated information for the Asset Register necessary to satisfy, as a minimum, the requirements of CIPFA and RICS, with other information included as requested by your line manager.
  - 15.1.4. Undertake a uniform rolling programme of valuations such that all Authority properties are revalued over a five-year period with further interim valuations undertaken when capital works acquisitions or part disposals arise. Adjust the rolling programme when requested to undertake specific priority valuations by your line manager.
  - 15.1.5. Maintain the Asset Register in accordance with CIPFA and RICS guidelines.
  - 15.1.6. Ensure that appropriate information from the Asset Register, following agreement with your line manager, is readily available for Officer, Member or public scrutiny and that all information is readily available to your line manager.

## 16. Rating Valuation and Appeals (Optional)

- 16.1. Your line manager will review on an annual basis to determine if there is merit in undertaking this service. It is recommended to take the approach of engaging external specialists preferably on a no win no fee basis. The work is expected to include:
  - 16.1.1. Undertake rating evaluations of your line manager's properties and advise your line manager of those assessments considered incorrect.
  - 16.1.2. Investigate the Uniform Business Rate assessments of Authority property.
  - 16.1.3. Inspect property
  - 16.1.4. Undertake valuations where necessary and then determine whether making an appeal would significantly reduce an assessment.
  - 16.1.5. Consult with and advise your line manager.

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- 16.1.6. Submit and negotiate appeals with the District Valuer.
- 16.1.7. Agree terms or court election with Authority authorisation, and formalise such terms as agreed.
- 16.1.8. Carry out Rating Valuation for Local Valuation Tribunal.
- 16.1.9. Assemble evidence for tribunal
- 16.1.10. Attend court and tribunal hearings
- 16.1.11. Conduct the associated negotiations
- 16.1.12. Charges for Tribunal work are charged as an addition.

## 17. Authority Tax Valuation (Optional)

- 17.1. Your line manager will review if there is merit in undertaking this element of the service, which will be expected to include for the following:
- 17.2. Undertake Council Tax banding evaluations of your Authority's properties and advise your line manager of those bandings considered incorrect.
  - 17.2.1. Inspect property.
  - 17.2.2. Provide advice to your line manager regarding suggested bandings.
  - 17.2.3. Liaise with your line manager regarding whether appeals should be made
  - 17.2.4. Make formal proposals and carry out the necessary negotiations
  - 17.2.5. Agree banding or tribunal election with your line manager's authorisation and formalise such terms as are then agreed.
  - 17.2.6. Carry out Council Tax Valuation for Council Tax Tribunal.
  - 17.2.7. Assemble evidence for Tribunals.
  - 17.2.8. Attend Tribunal hearings
  - 17.2.9. Conduct the associated negotiations.
  - 17.2.10. Tribunal work charged as an addition.

## 18. Insurance Valuations (Optional)

- 18.1. Your line manager at present undertakes this service,' but may at its option decide to use the Valuer to provide this service.
- 18.2. If instructed the Valuer shall include for the following:

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- 18.2.1. Utilise current published rebuilding costs on an area basis, for each individual property, location and the like (and VAT).
- 18.2.2. Undertake a desktop exercise, utilising property data to provide a single figure portfolio valuation of your line manager's properties.
- 18.2.3. Undertake insurance valuations of your line manager's properties and/pr assets in accordance with requirements of your line manager's insurers as and when instructed by your line manager.
- 18.2.4. Undertake a formal inspection and valuation report for properties and/or assets as and when requested.

## 19. Surrender and Assignment of Leases

- 19.1. The Valuer shall undertake the following:
  - 19.1.1. Respond to/serve landlord's notices by agreement with your line manager and occupying departments with third party tenants.
  - 19.1.2. Discuss terms to vacate with the occupiers and your line manager.
  - 19.1.3. Liaise with occupiers and your line manager as surrender or assignment progresses, ensuring all final meter readings etc to ensure a smooth transaction.
  - 19.1.4. Hand over keys.
  - 19.1.5. Make court applications, providing evidence and attend if necessary.

## 20. Property Management

- 20.1. The Valuer shall undertake the following core services:
  - 20.1.1. Supervise tenancies and deal with all matters relating to leasehold management, undertaking appropriate action and surveys prior to terminating a lease or licence or when a tenant vacates a property, and ensuring your line manager's financial and legal interests are protected in respect of the service of notices, records of condition etc. Further instructions may be sought before pursuing some of these areas.
  - 20.1.2. Regularly inspect properties and liaise with tenants/occupiers and answer tenants/occupiers enquiries, informing your line manager of problems where professional judgement dictates.
  - 20.1.3. Deal with issues of non-compliance with lease covenants, pursuing works or compensation. Also to deal with incoming claims against the client.
  - 20.1.4. Ensure the payment of outgoings and manage staff as appropriate.
  - 20.1.5. Chase arrears prior to court application with quarterly advice to your line manager of the status of arrears.

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- 20.1.6. Make appropriate management arrangements for the security, maintenance, grounds and cleaning contracts, etc of all surplus properties, and the necessary revisions to such arrangements.
- 20.1.7. For surplus property specify and supervise repairs, breakdown and day-to-day maintenance by Contractors, but not to undertake any more detailed inspection than may be relevant to such supervision.
- 20.1.8. Assist in the determination of boundaries and responsibilities attaching to Authority property interests and resolve disputes with adjoining landowners as necessary.
- 20.1.9. Carry out (or contributing to the carrying out) of any "one off" large scale property reviews of geographical areas or individual services or buildings as commissioned by your line manager.

## 21. Planning and Development

21.1. The Valuer shall undertake the following :

- 21.1.1. Receive local plan, etc and planning applications affecting the Authority's Estate.
- 21.1.2. Advise your line manager of development or other opportunities and detrimental proposals arising out of the consultation process for the Local and Structure or Unitary Plan and Policies, planning applications, SSSI's, etc.
- 21.1.3. Advise your line manager of suggested recommendations to be made regarding objections / comments to the Local Planning Authority, bearing in mind the sensitivities of this being a department of the client.
- 21.1.4. Liaise with your line manager upon receipt of amended plans, etc. making further comments and objections as required to represent your line manager's views as landowner.

## 22. Development Feasibility Studies

22.1. The Valuer shall undertake the following based on agreed level of input:

- 22.1.1. Be pro-active in the ongoing development and improvement of the Authority's property holdings.
- 22.1.2. Seek development opportunities for surplus property awaiting disposal.
- 22.1.3. Provide advice to your line manager after consultation with the Planning and Highways Departments, etc.

## 23. Submission of Planning Applications

23.1. The Valuer shall undertake the following based on agreed level of input:

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- 23.1.1. Complete planning application forms and enclosures for submission to the Planning Authority and provide a copy of the application form.
- 23.1.2. Discuss and provide further information as necessary in consultation with your line manager.
- 23.1.3. Receive and advise your line manager of views on Planning Authority decisions.
- 23.1.4. If a planning application is refused, advise your line manager of the options available for an appeal or alternative application.
- 23.1.5. Obtain, where required, the renewal of planning permissions prior to the expiry of existing permissions.

## 24. Regaining Possession of Property

- 24.1. The Valuer shall undertake the following:
  - 24.1.1. Should illegal entry and/or occupation take place, take all necessary action to remove trespassers.
  - 24.1.2. Where authorised by your line manager serve notices and discuss terms to vacate with the tenants.
  - 24.1.3. Proceed to regain possession of premises.
  - 24.1.4. Receive keys and ensure that all final meter readings are undertaken, etc.
  - 24.1.5. Make court applications, providing evidence and attend if necessary.

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