

RM3816 – Estates Professional Services

Scope of services and description of services available

RM3816 ESTATE PROFESSIONAL SERVICES SCOPE OF SERVICES TABLE

✓ Mandatory / o Optional / X Out of scope for specific lot

Service	Lot 1	Lot 2	Lot 3	Lot 4
Acquisition of freehold and leasehold property	✓	✓	X	X
Disposal (includes letting or other commercial arrangements) of freehold and leasehold property	✓	✓	X	X
Rent reviews	✓	✓	X	X
Lease breaks and lease expiries	✓	✓	X	X
Lease renewals	✓	✓	X	X
Dilapidations - Undertaking surveys / leading negotiations	✓	✓	X	X
Landlord and Tenant issues including Landlord consents, service charges and claims	✓	✓	X	X
Rating support services	✓	✓	X	X
Strategic advice, including the preparation and development of an estate strategy	✓	o	X	X
Procurement strategy for property related issues	✓	o	X	X
Development consultancy and advice	✓	o	X	X
Valuations	✓	✓	X	X



Planning	✓	✓	X	X
Building surveying services	✓	✓	X	X
General advice on estate and property management including strategy	✓	✓	X	X
General estate and property management duties, (landlord and tenant day to day)	✓	✓	X	X
Rating appeals	✓	o	X	X
Compulsory purchase	✓	o	X	X
Daylighting/ sunlighting/ overshadowing and rights of light	✓	✓	X	X
Party wall awards	✓	✓	X	X
Way-leaves and easements	✓	✓	X	X
Other neighbourly matters	✓	✓	X	X
RIBA stage planning (0 to 2 / part of pre-acquisition scope)	✓	o	X	X
Retail Property Services/Management	✓	o	X	X
Workplace planning and space optimisation including but not limited to:	✓	o	X	X
• Demand assessment	✓	o	X	X
• Capacity testing	✓	o	X	X

Performance of assets	✓	o	X	X
Property Investment, Appraisal and Financial Advisory Services	✓	o	X	X
Energy Efficiency Services	✓	o	X	X
Health and Safety advisory services	✓	o	X	X
Fire advisory services	✓	o	X	X
Environmental advisory services	✓	o	X	X
Sustainability advisory services	✓	o	X	X
Agricultural Land Management Advisory Services	✓	o	X	X
International Delivery	o	X	X	X
Facilities Management and Property Services (Procurement Managed Service)	X	X	X	✓
Vertical Real Estate Services	X	X	✓	X

Acquisition of freehold and leasehold property (Lots 1 & 2)

Following agreement on a procurement strategy, the Supplier will undertake and manage a comprehensive search of available property solutions, including availability on the Government Estate via GPU. This may include but will not be limited to:

- The preparation of lists of potential properties.
- Assistance in identifying appropriate terms.
- Identification of any surveys that may be required.
- Advice on the most appropriate solution.
- Undertaking negotiations.

- Agreeing appropriate terms and conditions.
- Acquiring the recommended asset.

Disposal of freehold and leasehold property (Lots 1 & 2)

Where surplus land, property, space or holdings have been identified, the Supplier shall provide an initial report with budget costs, valuations, forecast incomes, anticipated outcomes and timings which take into account market conditions and risks, together with a recommendation to achieve the most favourable outcome for the Contracting Authority. The Contracting Authority will agree the budget with the Supplier. The Supplier should be incentivised by the Contracting Authority to achieve a saving against the agreed budget. The Supplier shall undertake and manage the marketing and disposal through to a satisfactory conclusion. The Supplier shall provide a comprehensive final report to support a recommendation, including any need for claw back, with advice on amounts and mechanism.

Rent reviews (Lots 1 & 2)

The Supplier shall provide an initial report covering all significant facts setting out actions, negotiating strategies and anticipated outcomes. Following agreement with the Contracting Authority, the Supplier shall undertake and manage negotiations through to a satisfactory conclusion. The Supplier shall provide a comprehensive final report to support a recommendation on a figure for settlement. In the event that a satisfactory settlement cannot be reached, the Supplier will advise on appropriate courses of action and may be required to represent the Contracting Authority in any further proceedings.

Lease breaks and lease expiries (Lots 1 & 2)

The Supplier will provide comprehensive and timely advice for the Contracting Authority, as landlord or tenant, on the most appropriate course of action to be taken at an imminent break or expiry, including liaising with the Contracting Authority's appointed legal advisors. This can include lease termination, advice and support for preparing lease exemption request business cases to GPU. The Supplier shall take full account of the Contracting Authority's best interest, the statutory position, the Contracting Authority's estate strategy, business needs, condition of the building, dilapidation liabilities and the state of the market.

Lease renewals (Lots 1 & 2)

The Supplier shall provide an initial report covering all significant facts, setting out actions, negotiating strategies and anticipated outcomes.

Following agreement with the Contracting Authority, the Supplier shall undertake and manage negotiations through to a satisfactory conclusion and provide a comprehensive final report to the Contracting Authority to support a recommendation for agreement. Advice, including support preparing Lease Exemption Request business cases to GPU, shall take full account of the Contracting Authority's best interest, subject to any overriding Exchequer interest, the statutory position, the Contracting Authority's estate strategy, business needs, the condition of the building and the state of the market.

Dilapidations (Lots 1 & 2)

The Supplier shall provide comprehensive and timely advice for the Contracting Authority, as Landlord or Tenant, on the most appropriate course of action to be taken on a dilapidations liability. Advice shall take full account of the Contracting Authority's best interest, the statutory position, the likely future use of the property, the condition of the building, the lease provisions and the Contracting Authority's financial position.

Following agreement with the Contracting Authority, the Supplier shall undertake and manage negotiations through to a satisfactory conclusion and provide a comprehensive final report to support a recommendation on a settlement.

Where it is concluded that the interests of the Contracting Authority would be best served by the completion of works identified within the dilapidations assessment, the Supplier will specify, arrange procurement and manage those works.

Landlord and Tennant issues including: Landlord consents, service charges and claims (Lots 1 & 2)

The Supplier shall ensure that the Contracting Authority's position as Landlord or Tenant is fully protected through the appropriate seeking, granting or use of licences, written approvals, consents, insurances etc.

The Supplier shall provide a full analysis and recommendations on Service charges and other claims received by the Contracting Authority including the results of any Landlord or Tenant negotiations or negotiations with third parties.

Rating Support Services (Lots 1 & 2)

The Supplier shall provide professional advice, guidance, negotiation and assistance on non-domestic rating issues including a proactive strategy to mitigate changes in liability arising from new buildings and alterations. This will include as a minimum:

- General administration including but not limited to checking rates bills for accuracy of fact and calculation.
- Providing forecasts for budgeting purposes including apportionments for lettings and estimates for new buildings.
- Baseline liability, providing advice on baseline certificates to ensure accuracy and consequently that liability can be calculated correctly during the application of transitional relief provision.
- Full payment management, providing a full Service checking and paying Contracting Authority rate bills. Including but not limited to general administration and baseline liability services as set out above to ensure the Contracting Authority's liabilities are correct and mitigated to the fullest extent without going to appeal and should include the potential initial consultation fees for compiled list and material change appeals.
- Compiled list appeals including: Providing initial advice on assessment correctness and the likelihood of success, Forecasting and checking rate refund calculations from the billing authority and checking interest payment calculations issued by the billing authority. In light of any such appeals examine the baseline certificate to ascertain whether this can be challenged to produce further savings.
- Material Change Appeals including giving advice on matters such as: Providing initial advice on whether any savings can be achieved, Correcting assessment consequent on "material changes" (within the meaning of relevant legislation), Applications to Billing Authorities for reduced payments because properties are unoccupied or partly occupied, Applications for charitable relief and Appropriate splits and mergers.
- Give advice on the revaluation process by: Formulating a proactive "Right First Time" strategy to mitigate changes in liability arising from the revaluation process, Ensure that the necessary data (including rental data) is supplied as necessary to support the accuracy of 2015 (as amended) "Non Domestic List assessments" and Give advice on the likely financial impact of the revaluation. Contracting Authorities must pay the correct amount of rates. It will be the responsibility of the Supplier to take all reasonable steps to ensure this is achieved, resolving issues through the most suitable route.

Strategic Advice (Lot 1 & Lot 2 optional)

The Supplier shall work with the Contracting Authority to provide appropriate strategic advice and/or develop a comprehensive estate strategy. The strategy shall set out the business need and justification, any existing estate options or GPU [GPA] policies/strategies and implications, procurement and funding options and a recommended way forward which demonstrably best represents whole life value for money. The evidence will be underpinned with full risk and benefits analysis to allow the Contracting Authority to make informed decisions.

Advice can be provided in many areas including but not limited to:

- Asset management.
- Development appraisal.
- Investment appraisal / advice.
- Regeneration.
- Market research and market advice on either a generic, area, use or site basis for occupation, investment and development.
- Registered providers of social housing.
- Local authority rental policies.

Procurement strategy for property related issues (Lot 1 & Lot 2 optional)

The Supplier shall assess all aspects of a property requirement and provide advice on the procurement strategy that best provides the optimum value for money solution. Options may include, but are not limited to: PFI/PPP, temporary accommodation and serviced accommodation. The Supplier shall be required to provide advice on:

- Whole life investment appraisals.
- Private funding of rationalisation schemes and property projects.
- Market trends and rental forecasts.
- Tax implications.
- Risk transfer.
- Residual values.
- Development agreements.
- Developer selection.
- Estate rationalisation and review.
- Funding.
- Treasury Green Book Business Cases and Appraisal.

Development consultancy and advice (Lot 1 and Lot 2 optional)

The Supplier shall implement strategies to assist with developer/partner selection. The Supplier shall also develop, consult and advise on forecasts on future movements in key markets and relevant indices such as House Price Index, commercial property rents, yields and cost inflation.

The Supplier shall develop, consult and advise on housing market assessments and shall develop, consult and advise on recoverable investment programmes, such as Get Britain Building and Build to Rent.

The Supplier shall develop, consult and advise on infrastructure investment and delivery programmes, such as Local Infrastructure Fund and also develop, consult and advise on Public Land asset transfers, joint ventures and Public Private Partnerships.

The Supplier shall also perform these key tasks:

- Provide an assessment of private sector demand/market interest.
- Prepare and develop marketing briefs.
- Market and promote the development opportunity.
- Undertake master planning/feasibility work (possibly linking to the planning work area).
- Undertake valuations and development appraisals.
- Provide advice on site assembly (linking to compulsory purchase).
- Provide advice on delivery vehicles/mechanisms.

Valuations (Lots 1 & 2)

Valuations to the appropriate Framework standards (including RICS Valuations – Professional Standards 2012 (the ‘Red Book’)) shall be provided by the Supplier. An agreed valuation sign off methodology shall be agreed with the Contracting Authority. The Contracting Authority may also require independent valuations which can take a number of forms including:

- Full valuations, in accordance with RICS valuations – Professional Standards 2012. Including VPGA’s 1 – 10. Web link to RICS valuations guidance: <https://www.rics.org/globalassets/rics-website/media/upholding-professional-standards/sector-standards/valuation/red-book-2017-global-edition-rics.pdf>
- Asset valuations, valuations for financial reporting purposes, including capital charges, undertaken in accordance with the prevailing accounting standards as interpreted for the UK public sector and current professional standards guidance.

Planning (Lots 1 & 2)

The Supplier shall provide town and country planning advice and consultation where necessary. The Contracting Authority will specify the particulars of the advice required.

The Supplier shall be required to provide independent planning information and advice to the Contracting Authority, including consultations and negotiations with planning authorities and the submission of formal applications, notices, appeals and Section 106 Agreements, Section 278 Agreements (Highways) and CIL (Community infrastructure Levy).

Qualified planners may deliver advice including but not limited to:

- Strategic planning advice.
- Disposal related planning advice.
- Planning applications.
- Planning appeal.
- Development plan work on emerging plans.

- Statutory planning work.
- Affordable housing requirements.
- Accessibility.
- Green travel plans.

Building surveying services (Lots 1 & 2)

The Supplier shall undertake a pre-acquisition or more detailed technical due diligence inspection and report for freehold and leasehold property. This may include, but not be restricted to:

- Detailed survey.
- Reviewing technical data available for the property.
- Planning restrictions.
- Operation and maintenance data.
- Organising environmental assessments.
- Considering implications for the building's potential use including occupancy capacity testing, while taking into account the suitability for the intended use of the property.

General advice on estate and property management (Lots 1 & 2)

The Supplier shall provide advice on all aspects of Estate, property and housing management to support the delivery of the Contracting Authorities statutory, regulatory and business objectives.

General estate and property management duties (Lots 1 & 2)

The Supplier shall carry out general estate asset management duties including but not limited to:

- Day to day estate asset management of the commercial estate, integrating and liaising with current estate suppliers as necessary.
- Day to day asset management of the retail estate, integrating and liaising with current estate suppliers as necessary.
- Day to day estate asset management of the residential estate.
- Ownership and responsibility for managing the Contracting Authorities estate information within their own property database or suppliers, ensuring that its management and maintenance is current and that it shall interface and be compatible with the supplier's database for the estate.

- Updating and maintaining a property asset management plan for implementation of agreed strategies.
- Landlord management.
- Tenant management.
- Service charge management.
- Vacant property management including regular visits and the provision of appropriate security measures.
- Financial management, including checking and paying Contracting Authority service charges, insurance and rent including general administration.
- General management duties as specified by the Contracting Authority.

Rating appeals (Lot 1 & Lot 2 optional)

The Supplier is expected to provide a number of services including but not limited to:
Baseline liability:

- Providing advice on baseline certificates and where appropriate challenging these to generate savings during transitional phasing.
- Full payment management.
- Ensure the Contracting Authority's liabilities are correct and mitigated to the fullest extent without going to appeal and should include the potential initial consultation fees for compiled list and material change appeals as set out below.

Compiled list appeals:

- Providing initial advice on the likelihood of success.
- Lodging formal appeals against the rating assessment and negotiating with the relevant body in an attempt to agree to a lower rateable value.
- In the light of any such appeals examine the baseline certificate to ascertain whether this can be challenged to produce further savings.

Material change appeals:

- Giving advice on material change appeals.
- Lands/valuation tribunal hearings including: Compliance with all necessary statutory/regulatory/practice statements that may apply. The Supplier will also advise the Contracting Authority as soon as it becomes apparent that a suitable agreement cannot be achieved through the normal appeal process as well as also recommending the most appropriate course of action to be taken and provide extensive advice on the positive and negative implications. The Supplier will consult on the procurement of external assistance, for example appointing legal support and provide professional support at tribunals. This may also cover advising on the potential costs that will flow from such action. The supplier will finally prepare statements of case, and Respond to replies as necessary and to comply with any timeframes applying.

Compulsory purchase (Lot 1 & Lot 2 optional)

The Supplier shall provide compulsory purchase advice. This will include, but not be restricted to, procedural, and negotiation advice.

The Supplier shall provide strategic and procedural advice on how to obtain powers to promote a Compulsory Purchase Order (CPO) the Supplier shall advise on all stages of the CPO process from inception through public inquiry, possession and subsequent negotiation of property acquisition and compensation, if necessary by referral to the Lands Tribunal. In addition to this they may be a requirement for the negotiation and settlement of Part 1 claims.

Where the Contracting Authority owns or occupies land which is subject to a CPO being promoted by another body, the advice shall include potential objection to the CPO and appearance at public inquiry if appropriate and the agreement of terms of withdrawal of objections/undertakings. It shall also include negotiation for the sale of land and settlement of compensation, if necessary by referral to the Lands Tribunal.

Daylighting, sunlighting, overshadowing and right of light (Lots 1 & 2)

The Supplier shall provide daylighting, sunlighting and overshadowing advice when a planning application is made. This will cover an analysis of how adjoining properties are affected by the scheme and provide data to ensure that any residential accommodation in the scheme complies with the British Standard on lighting.

In the case of rights of light, advice shall be given to show what adjoining properties could lose light as a result of the scheme.

Party wall awards (Lots 1 & 2)

The Supplier shall provide advice, either when the Contracting Authority is the building owner developing or when notices are served on the Contracting Authority as an adjoining owner to a development site.

Advice shall be given so notices are served at the right time and awards entered into as required. Detailed schedules of condition are prepared.

Way-leaves and easements (Lots 1 & 2)

The Supplier shall provide an initial report covering all significant facts, setting out actions, negotiating strategies and anticipated outcomes.

The Supplier shall undertake and manage negotiations through to a satisfactory conclusion and provide a comprehensive final report to support a recommendation on a figure for settlement.

In the event that a satisfactory settlement cannot be reached, the Supplier shall advise on appropriate courses of action and represent the Contracting Authority in any further proceedings.

Other neighbourly matters (Lots 1 & 2)

The Supplier shall provide an initial report covering all significant facts. The report will set out actions, negotiating strategies and anticipated outcomes with respect to boundary disputes, crane and scaffold over sailing. The Supplier shall undertake and manage negotiations through to a satisfactory conclusion and provide a comprehensive final report to support a recommendation on a figure for settlement.

In the event that a settlement cannot be reached, the Supplier will advise on appropriate courses of action and represent the Contracting Authority in any further proceedings.

RIBA stage planning (Lot 1 and Lot 2 optional)

The Supplier shall undertake a pre-acquisition or more detailed technical due diligence inspection and report for freehold and leasehold property. Where required the Supplier will complete a feasibility study which will include but not be limited to:

- RIBA Stage planning 0-2, understand the customer's core objectives, produces a number of concept designs to prove property potential, identifies budget estimates for potential alteration works that may be required
- Where it is concluded that the interests of the Customer would be best served by the completion of works identified within the building surveying the Supplier will specify, arrange procurement and manage these works.

Retail Property Services / Management (Lot 1 & Lot 2 optional)

The Supplier shall carry out general estate asset management duties including day-to-day asset management of the retail estate, integrating and liaising with current estate suppliers as necessary.

Demand Assessment & Capacity testing (Lot 1 & Lot 2 optional)

The Contracting Authority may require independent detailed surveys and reports including schedules of conditions on the current condition of a property or asset, including estimates

of costs and priorities to bring the property to an agreed acceptable standard, optimum timing of maintenance and repairs, statutory obligations (including asbestos and equality legislation), health & safety issues/risks and whole life costs which should be attached to the occupancy agreement. This may include Demand assessment & capacity planning, helping organisations to drive productivity improvements through intelligent integration of the full suite of property, technology and people services.

Performance of assets (Lot 1 & Lot 2 optional)

The Contracting Authority may require independent detailed surveys and reports including schedules of conditions on the current condition of a property or asset. This may include property performance, including space utilisation space optimisation / efficiency planning.

Property Investment, Appraisal and Financial Advisory Services (Lot 1 & Lot 2 optional)

The Supplier shall work with the Contracting Authority to provide appropriate strategic advice and/or develop a comprehensive estate strategy. The strategy shall set out the business need and justification, any existing estate options or GPU [GPA] policies/strategies and implications, procurement and funding options and recommended a way forward which demonstrably best represents whole life value for money. The evidence will be underpinned with full risk and benefits analysis to allow the Contracting Authority to make informed decisions. This advice can be provided in many areas including but not limited to investment, appraisal and financial advice.

Energy Efficiency Services (Lot 1 & Lot 2 optional)

The Contracting Authority may require independent detailed surveys and reports including schedules of conditions on the current condition of a property or asset. This may include providing advice on Energy efficiency plans and statutory compliance.

Health and Safety advisory services (Lot 1 & Lot 2 optional)

The Contracting Authority may require independent detailed surveys and reports including schedules of conditions on the current condition of a property or asset, including health & safety issues. This may include providing services in relation to a professional advice service on all matters relating to the Health and Safety at Work Act 1974 and any subsequent re-enactments.

Fire advisory services (Lot 1 & Lot 2 optional)

The Contracting Authority may require independent detailed surveys and reports including schedules of conditions on the current condition of a property or asset which may include providing a professional advice service on all matters relating to the Regulatory Reform (Fire Safety) Order 2005 and any subsequent re-enactments.

Environmental advisory services (Lot 1 & Lot 2 optional)

The Supplier shall undertake a pre-acquisition or more detailed technical due diligence inspection and report for freehold and leasehold property. This may include organising environmental assessments.

Sustainability advisory services (Lot 1 & Lot 2 optional)

The Contracting Authority may require independent detailed surveys and reports including schedules of conditions on the current condition of a property or asset. This may include providing professional advice on Sustainability plans.

Agricultural Land Management Advisory Services (Lot 1 & Lot 2 optional)

The Supplier shall provide comprehensive agricultural services as defined by the Contracting Authority in the following areas but not limited to:

- Agricultural tenancy management.
- Farm management (including diversification) 1986.
- Agricultural Holdings Act tenancies.
- 1995 Agricultural Tenancies Act tenancies.
- Grazing and cropping licences.
- Live and dead stock valuation.
- Crop valuation.
- Covenant management.
- Succession (1986 Act Tenancies).
- Assignment of tenancies.
- UK farming subsidy (inc. post Brexit direction and advice).
- Agricultural--Environmental schemes.

International Delivery (Lot 1 optional)

The Supplier shall deliver all mandatory services, including but not limited to professional management, workplace planning and space optimisation including but not limited to demand assessment and capacity testing, advice, guidance, negotiation and assistance on property and estates issues, on a national basis. As an optional service Suppliers can provide any number of the services within this Lot at locations outside of the UK (International Delivery).

Facilities Management and Property Services (Procurement Managed Service) (Lot 4)

The Supplier shall deliver all applicable Services, on a national basis including but not limited to:

- Full end-to-end managed procurement service.
- Procurement strategy development.
- Procurement and project management advice ensuring timely activity.
- Options analysis.
- Development of customer business case, for Central Government Departments, assist with the Cabinet Office Controls Process.
- Asset verification and condition surveys.
- Compiling asset information for population to the data pack, service matrix, cost models, KPI's and ITT documentation.
- Managing the procurement process and overseeing the mobilisation process.
- Agreeing the contract terms and conditions with the client.
- Management of contractors/suppliers, on a national basis.

Vertical Real Estate Services (Lot 3)

The services required under a Vertical Real Estate Framework for delivery on a national basis are to include but not limited to rooftops, greenfield sites and small cells.

The Supplier shall provide advice, guidance, management and assurance on the leasing of new sites, existing sites that have infrastructure and agreements in place with Infrastructure Providers, Emergency Services Network (ESN) or Mobile Network Operator's (MNO's) or sites where the Contracting Authority is the Tenant and VRE infrastructure is proposed or exists.

The supplier shall provide advice, guidance, management and assurance on the use of buildings, mast or structure that may be used for antennas, solar panels or other appliances together with buildings, masts or structures that may be used for signage, advertising and other purposes along with those services needed to support the commercial exploitation of such spaces.