

## Appendix A – Estates Management SLA

General Work Category	Area of Work	Description of Work to be Undertaken	Charging Basis
1 Management of Leased Properties	1.1 Approval of Tenants Works	Receiving applications for tenants works of alteration from tenants. Checking they are in line with terms of occupancy. Liaison with relevant internal sources and consideration of application. Granting of approval or otherwise. Making applications on behalf of Council as tenant. Liaising with relevant internal sources to achieve Approval. Inspection as necessary	Standard charge (£150) or Hourly Rate (whichever is greater)
	1.2 Assignments / Sub Letting	Receiving applications for assignments from tenants. Checking they are in line with terms of occupancy. Liaison with relevant internal sources and consideration of application. Liaison with tenant and proposed assignee/sub-lessee. Granting of approval or otherwise. Making applications on behalf of Council as tenant. Liaising with relevant internal sources to achieve Approval. Inspection as necessary	Standard charge (assignments £300, sub-letting £250) or Hourly Rate (whichever is greater)
	1.3 Breaches of Covenant	Enforcing against breaches of covenant by tenants. Liaison with relevant internal sources. Reference to Legal Advisers. Providing advice to clients and occupiers to prevent breach of covenant where Council is tenant. Inspection as necessary	Hourly Rate
	1.4 Building Insurance	Ensuring that each property has benefit of Building Insurance. Recharging tenants where applicable. Liaison with relevant internal sources to update as appropriate. Inspection as necessary	Hourly Rate
	1.5 Change of Use	Receiving applications for change of use from tenants. Checking they are in line with terms of occupancy. Liaison with relevant internal sources and consideration of application. Liaison with tenant. Consideration of potential financial benefits. Granting of approval or otherwise. Making applications on behalf of Council as tenant. Liaising with relevant internal sources to achieve Approval. Inspection as necessary	Hourly Rate
	1.6 Dilapidations	Check terms of lease/other form of occupancy. Apply terms appropriately. Instruct building surveyors etc as required. Internal liaison. Negotiation of settlement. Inspection as necessary	Hourly Rate
	1.7 Minor Lease Variations	Receiving applications for minor lease variations from tenants. Liaison with relevant internal sources and consideration of application. Liaison with tenant. Consideration of potential financial benefits. Granting of approval or otherwise. Making applications on behalf of Council as tenant. Liaising with relevant internal sources to achieve Approval. Inspection as necessary	Hourly Rate

<b>2. Rent Reviews &amp; Lease Renewals</b>	2.1 Lease Renewals Negotiations	Liaison with Legal and other internal sources leading up to and during lease renewal proceedings to ensure proper processes undertaken. Consultation of lease and other relevant documentation. Undertaking valuation. Negotiation and settlement of lease renewal terms. Instruction of legal etc and liaison to completion. This will not include reference to third party/court hearings etc.	Hourly Rate
	2.2 Rent Reviews Negotiations	Liaison with Legal and other internal sources leading up to and during rent review proceedings to ensure proper processes undertaken. Consultation of lease and other relevant documentation. Undertaking valuation. Negotiation and settlement of rent review terms. Instruction of legal etc and liaison implementation This will not include reference to third party/court hearings etc.	Hourly Rate
	2.3 Surrenders and Regrants	Receiving requests from tenants. Liaison with relevant internal sources and consideration of application. Liaison with tenant. Undertaking valuation. Negotiation and settlement of terms. Instruction of legal etc and liaison to completion. Consideration, with relevant parties, of potential to be offered from a surrender/regrant, to the Council where it is tenant. Making applications on behalf of Council. Liaising with relevant internal sources to achieve Approval. Instruction of legal etc and liaison to completion.	Hourly rate
	2.4 Lease Terminations	Receiving requests from tenants. Liaison with relevant internal sources and consideration of application. Liaison with tenant. Undertaking valuation. Negotiation and settlement of terms. Instruction of legal etc and liaison to completion. Consideration, with relevant parties, of potential to be offered from a surrender, to the Council where it is tenant. Making applications on behalf of Council. Liaising with relevant internal sources to achieve Approval. Instruction of legal etc and liaison to completion.	Hourly Rate
	2.5 Reference to Third Parties	Acting on behalf of the Council to ensure best outcome from a reference to a third party, including applications to court. As necessary acting as expert witness. To include compilation of evidence, liaison with internal and external parties, attendance at court/hearings/tribunals.	Hourly Rate
<b>3. Asset Management</b>	3.1 Asset Management	Contribute as required to the formulation and implementation of a Corporate asset Management Strategy working towards maximization of the performance of the portfolio.	Hourly Rate
<b>4. Acquisitions and Disposals</b>	4.1 Lettings	In liaison with other parties establish and bring forward letting opportunities. Devise and implement marketing strategy. Provide valuations and advice to clients. Determine best bids and negotiate and agree terms. Instruct and liaise with legal and others to completion	Hourly Rate
	4.2 Acquisitions	In liaison with other parties establish and bring forward acquisitions required for service provision. Provide valuations and advice to clients. Negotiate and agree terms of acquisition. Instruct and liaise with legal and others to completion	Percentage of Acquisition Cost subject to minimum charge
	4.3 Long Leases	In liaison with other parties establish and bring forward opportunities to offer long leases. Devise and implement marketing strategy. Provide valuations and advice to clients. Negotiate and agree terms. Instruct and liaise with legal and others to completion. Meet targets for Capital receipts	Hourly Rate or 2% of premium value whichever the higher

	4.4 Freehold Sales	In liaison with other parties establish and bring forward opportunities to dispose of property on a freehold basis. Devise and implement marketing strategy. Provide valuations and advice to clients. Determine best bids and negotiate and agree terms. Instruct and liaise with legal and others to completion.	Hourly Rate or 2% of Sale Proceeds whichever the higher
	4.5 Compulsory Purchase Orders	As required for service delivery needs, liaise with interested parties to bring forward a CPO or deal with orders served on the council. In line with the statutory provisions assist in the drawing up and service of necessary documentation. Provide valuations and advice to clients and liaise with other professionals. Negotiate towards settlement of compensation. Instruct and liaise with legal and other parties to completion. Attendance at enquiries/tribunals as necessary.	Hourly Rate plus expenses
	4.6 Tenancy at will	As required liaise with client to establish need for tenancy at will to be granted. Provide valuations and advice to clients. Negotiate and agree terms. Instruct and liaise with legal and others to completion	Hourly Rate
	4.7 Building Agreement	As required, liaise with client to establish need for building agreement to be granted or taken. Provide advice to clients and liaise with Building and other professionals. Negotiate and agree terms of agreement. Instruct and liaise with legal and others to completion.	Hourly Rate
<b>5. Valuations</b>	5.1 Estimates	As required by Council Standing Orders provide yearly estimates of rental value of relevant properties	Hourly Rate
	5.2 Asset valuations	Over a five-year programme provide asset Valuations to Red Book, CIPFA and internal accounting requirements of all relevant Corporate Property Holdings. – including inspections	Hourly Rate
	5.3 Rating Work	In line with the five yearly revaluation of National Non-Domestic Rates, undertake a review of rateable values in respect of Council occupied properties. In light of the review or other changes of circumstance, where appropriate bring forward appeals; undertaking all necessary valuations and negotiating with the Valuation Office towards settling at agreed value. Reference to rating or other tribunals to be dealt with under 'Reference to Third Party' SLA above.	Hourly Rate or 10% of savings a achieved – whichever the higher
	5.4 Valuations - One Off	Provide, at the request of the client, one off valuations, not related to other areas of work. Advice to client of the implications of the valuation provided.	Hourly Rate
<b>6. Special Projects</b>	6.1 Project Management	Undertake all necessary work to bring forward major property projects as agreed in liaison with client on a case to case basis	Hourly Rate
	6.2 Project Monitoring External	Where external contractors are employed to undertake property related work on the Council's behalf, ensure that the work undertaken is of suitable standards required outcomes are achieved.	Hourly Rate
	6.3 Development Opportunities	Through proactive management of the estate and in liaison with clients, bring forward development opportunities to maximize performance of the estate or further council aims and objectives. Undertake valuations and instruct/liaise with other professionals to bring forward schemes where practicable	Hourly Rate
	6.4 Feasibility	Receive instructions from Service Clients and clarify as necessary. Undertake all work and	Hourly rate

	Studies	liaise with other contributors to bring forward a feasibility study suitable for the required purpose. Present study in required format and advise clients on implications. Once signed off by client further amendments and revisions will be charged at an hourly rate	
	6.5 Covenants	As necessary for furthering the Council's aims and objectives or where good estate management dictates, liaise with legal and other parties to apply covenants to, especially, freehold sales which have the objective of protecting the Council's long term interests. Provide any necessary valuations and advice. Instruct and liaise with legal and other parties to completion of agreement. As necessary, take all necessary action to enforce covenants or if appropriate negotiate their alteration or surrender. Where covenants adversely effect Council land undertake all such necessary work and liaises with other parties to seek to have the covenants removed altered or disregarded. Provision of valuations and advice as appropriate.	Hourly Rate
<b>7. General Property Management</b>	7.1 Terrier	Updating and maintaining the Councils records on ownership, noting and verifying freehold and leasehold interests.	Hourly Rate
	7.2 Property Inspections	As required, undertake a inspection of properties in line with either lease or other requirements	Hourly Rate
	7.3 Rent Accounting	Management of issuing rent demands and collection of rents in line with lease or other terms	Hourly Rate
	7.4 Rent Arrears	Pursuit of rental arrears with recourse to a third party. Otherwise dealt with under Reference to third party SLA.	Hourly Rate
	7.5 General Property Advice to Clients	Advice to clients in respect of the management of performance of the estate, not covered by work areas above.	Hourly Rate
	7.6 Insurance Claims	Dealing with issues arising from either a third party insurance claim relating to property. Acting, as necessary in pursuit of an insurance claim by the Council.	Hourly Rate
	7.7 Grants of Minor Rights (wayleaves/easements)	Establishing need to take or grant minor right. Liaison with internal parties. Providing valuations and advice as required. Negotiation with other party towards settlement of terms. Instruction and liaison with legal and other parties to conclusion.	Hourly rate
	7.8 Encroachments	Establishing and seeking to prevent encroachments on to Council owned land.	Hourly Rate
	7.9 General Property Management	Day to day issues arising out of the management of the corporate estate not covered by other areas of work	Hourly Rate
	7.10 Boundary /Ownership disputes	Resolving ownership/title disputes, boundary disputes. Liaise with legal services and other parties. Hourly Rate	Hourly Rate

	7.11 Void Inspections	Providing and updating list of void properties. Instructing Building Services to undertake programme of monitoring voids. Advising of change of status.	Hourly Rate
<b>8. Local Government Overheads</b>	8.1 Committee Reports	Draw up and present reports to members or committee on issues affecting the Corporate Estate.	Hourly Rate
	8.2 Appropriations	Draw up and present necessary reports to facilitate the appropriation of property from one holding power to another.	Hourly Rate
	8.3 Councillor/Press Enquiries	Dealing with queries from Councilors or the Press in respect of matters relevant to the management of the Corporate Estate	Hourly Rate
	8.4 Appointment of Consultants	As required, and in line with Council standing Orders, undertake all processes involved with the appointment and overseeing of outside consultants, including authorisation and payment of fees.	Hourly Rate
	8.5 General Enquiries	Dealing with queries from external parties including the general public.	Hourly Rate
	8.6 Cost Centre Management	Ensure that appropriate management of internal cost centres is maintained.	Hourly Rate

### **Charge out rates as at 2016/17**

**Team Leader - £50 per hour**

**Senior Estates Surveyor - £45 per hour**

**Estates Surveyor - £35 per hour**

**Technician - £25 per hour.**