

REQUEST FOR QUOTATION SPECIFICATION

HOUSING AND NEIGHBOURHOODS – PROPERTY SERVICES

KMCHNPS-051

The Provisions of Residential Property Valuations Surveys and Development Site Appraisals

**Contract Period: 2 years with a possible two (2) year extension
period to take it to a maximum of 48 months**



SECTION 1: INTRODUCTION

Kirklees Council wish to appoint a valuer on a 2-year contract to provide a number of RICS residential property and market rental valuations, RICS level 3 building surveys, development site appraisals and general property consultancy advice. Subject to satisfactory performance which will be monitored against key performance indicators, the Council may extend the contract for a further 2 years.

SECTION 2: BACKGROUND INFORMATION

Kirklees Homes and Neighbourhoods Service provide housing management, income management, asset maintenance, repair functions and tenant support functions for the Council. It also undertakes development work to bring sites forward for the development of new homes and acquires housing from the market to provide new affordable housing supply. This includes the repurchase of former 'right to buy' properties funded through Right to buy capital (RTB) receipts and the Local Authority Housing Fund ['LAHF']. Additionally, the Council purchases properties constructed by developers as part of their planning obligations under Section 106 of the Town and Country Planning Act.

Within Kirklees there is currently a shortage in supply of homes particularly larger family homes to meet demand. This is further compounded by the sale of Council homes via right to buy every year whilst the number of households on the housing register continues to increase. Kirklees Council are therefore always seeking ways to acquire, convert and renovate existing properties as well as acquire and build new homes.

Kirklees Council must demonstrate value for money and ensure that new acquisitions comply with external funding conditions, and that acquisitions are also financially viable in relation to business plan assumptions. Consequently, the Kirklees Council is seeking to appoint a retained valuer to undertake a range of professional services to support these objectives. These activities are required to support the Council in its engagement in a commercial environment where the timely production of reports and advice is essential.

SECTION 3: STATEMENT OF REQUIREMENTS

The Scope of Services to be provided shall cover all the key duties outlined in the attached document.

The number of valuations, surveys and appraisals outlined in the specification represent estimated annual volumes. The proposed fees must remain fixed and apply consistently, regardless of the change in quantity.

The Consultant will be required to provide a level of resource to achieve the programme for a specific commission and the resource proposed shall be both competent and suitably qualified to provide the required level of service for the complexity of the specific commission.

There must be one central point of contact who can be contacted by telephone or generic email address during working hours of 9am to 5pm to arrange valuations, surveys and appraisals and acknowledgement of instruction within 24 hours.

Statement of requirements/ Outputs and delivery

1. Provision of approximately 35 market valuations

This is of individual existing properties (former ex-Council homes (Right-to-buy buy back (RTB BB) and private, new build or dwellings off plan to assist in the Council's purchase negotiations with vendors and the transfer of properties from the Council's General Fund to the Housing Revenue Account. Property types will include houses, bungalows and flats and will be a range of private and ex-Council dwellings.

Provision of the Right-to-buy Buy Back (RTB BB) valuation service on behalf of the Council should be in accordance with the (RICS) Code of Practice (revised 2009) on 'Valuations for Right to Buy, Right to Acquire and Equity Sharing of Social Housing'.

To visit, inspect every property internally and externally and complete a report and not rely upon desk top surveys.

The valuation should be in the form of a written report in accordance with instructions from the Council and in an agreed format in accordance with the code of practice to include - address, description, photographs of the property, opinion of value, date of inspection and date of valuation.

The report must include the following:

- Description of the accommodation including Gross Internal Area (GIA) in m2 and room dimensions.
- Robust local comparable evidence to support the valuation, justify basis of value and represent the Council on all referrals to the District Valuer where challenges are made regarding the valuation provided. To use the sale of any previous ex-council homes in the local area as comparable evidence where relevant. Should there be insufficient local comparable evidence available, the report should state this and include any relevant comparable evidence to support the assessment.
- All assumptions made by RICS-registered valuers must be clearly stated in the valuation report to ensure transparency and clarity for Kirklees Council. The report should identify any assumptions and the potential areas of risk included in the valuation. The report should reflect the information agreed upon in the initial terms of engagement with Kirklees Council.
- Details of repairs required and improvements that a typical buyer would expect to carry out at the property and confirm whether this has been taken into account in the valuation figure.
- To provide guidance as to whether there are any major structural issues and refer for further investigation where obvious defects raise concern. Based upon the detailed report the market value provided would need to be considered and re-presented.
- Detail the RICS valuer's opinion of value of the residential unit either freehold or leasehold.
- To include within the report at least 5-6 property photos including any potential problem areas.
- Value the property in relation to the specification the developer has provided for new build or off plan acquisitions.
- Be based on freehold market value assuming vacant possession.

- For flats and maisonettes, the value should reflect market value with vacant possession for a leasehold of 125 years.
- Advise the Council immediately after inspection where irregularities are identified relating to boundaries particularly where encroachments or undefined boundaries exist.
- Be undertaken by a RICS registered professional surveyor experienced in the valuation of residential property. To possess a good regional knowledge and understanding of local housing markets, trends and values including specific knowledge on house type, construction and known defective build type.
- Provision of initial market advice on estimated property valuations to determine whether Kirklees Council can afford to buy a property back will also be sought. To provide a knowledgeable and supportive professional assistance to Kirklees Council Homes and Neighbourhoods Team with particular reference to process, valuation and general property-based advice (where necessary).
- Reports must be provided within 10 working days from instruction to provision of valuation and should state that they are valid for a period of 6 months. Detailed analysis of market conditions and factors such as sustainability and items that would be picked up through the conveyancing process is **not required**.

2. Provision of approximately 35 market rental valuations

This is to inform the calculation of an affordable rent. It is expected that the majority of these will be instructed and can be carried out at the same time as the market valuations described at (1) above. A much smaller number will be required on properties that are still under construction.

Reports should include robust local comparable evidence to support the valuation. Should there be insufficient local comparable evidence available, the report should state this and include any relevant comparable evidence to support the assessment. The report should be valid for a period of 6 months. The Council may require this valuation to be refreshed/reconfirmed 6-12 months from the original valuation date and the fee should include for this.

3. Provision of approximately 5 market rental valuations

This is to inform the calculation of an affordable rent (no market valuation required). Reports should include robust local comparable evidence to support the valuation. Should there be insufficient local comparable evidence available, your report should state this and set out in detail how you have arrived at the valuation. The report should be valid for a period of 6 months. The Council may require this valuation to be refreshed/reconfirmed 6-18 months from the original valuation date and your fee should include for this or state an uplift for a revised rental valuation.

4. Provision of approximately 25 RICS Home Survey/Level 3 Building Surveys

These must be in accordance with RICS Homes surveys standard first addition professional statement to assist in the Council's purchase negotiations with vendors and to decide whether to purchase. Reports must be provided within 10 working days from instruction to provision of the home survey. This survey must: -

- Carefully, non-intrusively and thoroughly inspect the inside and outside of the main building and all permanent outbuildings, noting the construction details and defects

that are evident based on what can be accessed during the visit. Where this is not possible, the report must clearly state which parts of the property could not be inspected, explain the reason for the lack of access and describe the affected element. If there are concerns about parts of the property that the inspection cannot cover (hidden, inaccessible or view is limited), the report should highlight to Kirklees Council a description of the specific part of the property and concerns recommending what and why further investigations are needed and the type of specialist required.

- Provide a detailed professional report based on the inspection with photos.
- Use the necessary technology i.e. thermal Imaging Cameras, pole-mounted cameras, damp meters, tablets and digital tools, drones and borescopes to inspect hard-to-reach areas both internally and externally.
- Give professional advice in the report to help Kirklees Council make a reasoned and informed decisions when purchasing properties.
- Provide detailed advice in the report on condition.
- Describe the identifiable risk of potential or hidden defects in the report.
- Propose the most probable cause(s) of the defects based on the inspection in the report.
- Provide an estimate of costs and likely timescale of any work identified in the report including photos.
- Make recommendations as to any further actions to take or advice that needs to be obtained before committing to a purchase.

5. Provision of approximately 2 unrestricted market valuations of council sites for appropriation purposes.

Sites will vary in size from one to ten properties. Valuation reports should be provided within 10 working days of instruction and should be valid for a period of at least six months.

6. Undertake development viability appraisal and market advice based on a 30-year period to support 5 large acquisitions – information will be provided by the Council to complete this.

Certificates/accreditation required

Valuation work must be undertaken by a RICS registered professional surveyor experienced in the valuation of residential property and RICS Valuation Global Standards (Red Book). For a Level 3 Building Surveyor, the Red Book is not directly required for the surveying aspect but is essential if their work includes providing valuations, as the standards ensure accurate and objective reports. Valuers must demonstrate competency in a specific valuation competency to Level 3 and achieve an overall RICS Level 3 qualification, followed by completing the associated assessment and providing evidence of CPD on the RICS Red Book. They must also have completed the RICS Valuer Registration Scheme (VRS) and register with HMRC and implement anti-money laundering policies, including conducting customer due diligence, implementing risk assessments, to prevent illicit funds from entering the economy, record-keeping, and reporting suspicious activity under the Money Laundering Regulations 2017.

RICS Level 3 building surveys to be provided by an AssocRICS, MRICS or FRICS member of the Royal Institution of Chartered Surveyors (RICS) who has the skills, knowledge and experience to survey and report on residential properties.

RICS mandates that its members act ethically and professionally, adhering to relevant standards and legislation, which includes Building Regulations.

RICS Level 3 building surveyors must have in-depth knowledge and demonstrate competency in legal/regulatory compliance of building regulations (which includes Building Regulations 2010) to carry out the structural and compliance assessment to meet current building standards and identify defects or risks due to non-compliance and provide advice on remedial works and implications of non-compliance. Recommendations should reference the regulations in the report to ensure compliance.

RICS valuers must have practical and contextual knowledge and understanding of building regulations to evaluate their impact on a property's safety, future integrity, and market value/marketability and ensure their valuations reflect regulatory compliance. This will enable the valuer to provide informed advice to Kirklees Council about the potential risks and financial implications of regulatory issues.

All valuers and surveyors are expected to wear smart casual clothing to ensure a professional appearance during inspections and valuations and be prepared to show their professional identification if asked by the property owner or Kirklees Council.

All valuation and survey reports must provide us with the surveyor's name, Surveyor's RICS number, company name and date of inspection.

H&S, Personal data, safeguarding

All reported incidents and near misses to be reported by the supplier to identify areas for improvement.

Health and Safety:

The supplier (RICS valuers and building surveyors) must comply with UK health and safety legislation, as mandated by RICS standards and national law which includes the Health and Safety at Work Act 1974, Building safety act 2022 and the Management of Health and Safety at Work Regulations 1999. All surveyors and valuers must work safely, which includes having and using appropriate Personal Protective Equipment (PPE) to protect themselves from hazards as mandated by the Health and Safety at Work etc Act 1974 and RICS Surveying Safely guidance which reinforces the legal and ethical responsibility of surveyors to ensure health and safety, detailing the importance of thorough risk assessments of the site and inspection tasks and the correct use of PPE. This includes hi-vis jackets, hard hats, safety boots, and gloves.

The supplier must have robust H&S policies and procedures in place and adequate risk assessment(s), safe systems of working and methods statements when conducting/delivering services on behalf of Kirklees Council. All your personnel must be adequately trained to identify potential health and safety hazards and/or risks with property visits. This should cover physical hazards (e.g., uneven surfaces, asbestos, working at heights, fire safety), security risks (e.g., access to the property, lone worker safety), and potential for accidents. They must also implement control measures.

Valuers and surveyors must have appropriate training on safe working practices and are responsible for using any safety equipment or controls provided by their employer

The supplier must have appropriate insurance coverage for their activities, including public liability to cover third-party property damage or injury, professional indemnity to cover

negligence claims and Employers' Liability Insurance to cover injuries to employees, as mandated by the Royal Institution of Chartered Surveyors (RICS).

The supplier must have a system for reporting and investigating any H&S incidents or near misses. These incidents or near misses must be reported to Kirklees Council and be investigated within the supplier's own health and safety policy and practices.

RICS members are expected to adhere to health and safety standards and professional judgement in their practice.

UK Modern Slavery Act 2015

As a supplier you have professional responsibilities under the UK Modern Slavery Act 2015 to understand the Modern Slavery Act's Application and general duty of care and ethical practice. Key requirements include understanding the risks (in a risk assessment) within supply chains and business operations, having appropriate policies, conducting due diligence, and considering modern slavery in the context of a property's condition and any identified occupants. You must be aware of the signs of modern slavery, such as individuals appearing unkempt, lacking personal possessions, or working at unsociable hours. If a surveyor or valuer identifies potential evidence of modern slavery during a property visit, they should report it to the appropriate authorities, such as the Modern Slavery Helpline on 08000 121 700 or the police.

Personal Data Protection:

The supplier must comply with the UK General Data Protection Regulation (UK GDPR) and Data Protection Act 2018 when handling personal data such as the owner's name, contact details and property information gathered during the valuation and/or survey.

The valuer/surveyor must ensure only the necessary data is collected and processed lawfully and fairly, keep it secure, be transparent about data use and respect the rights of the individuals to access and control their information. Kirklees Council will share the seller's name and contact details with you as well as the property address under investigation, and this information must only be used for the intended purpose of contacting the owner to make arrangements to visit their property to value and/or conduct a building survey inspection. This information should not be used for unrelated activities and for any other purpose (e.g. for marketing your own services). As soon as the visit to the property to be valued or surveyed is completed, the seller's name and contact details must be safely disposed of/deleted within 2 weeks (14 calendar days) from that date of the valuation/inspection.

Implement appropriate technical and organisational measures to secure and protect personal data from unauthorised access, breaches, theft, loss, or disclosure. This includes encryption, access controls, and secure data storage. Safely dispose of any confidential information when the contract ends.

Train staff on GDPR compliance, including handling sensitive data.

Have a clear privacy policy that explains how personal data is handled and clear procedure in place for handling data breaches, should they occur. You must notify us of any data breach that involves our personal data as soon as possible after becoming aware of the breach. This is because, should we need to report it to our regulatory body (the ICO) we have a deadline of 72 hours from becoming aware of the breach to report it to them. Data processors are

critical to our compliance efforts. Your prompt reporting to us of any data loss, theft, or other incident helps us meet our regulatory obligations and allows for timely decision-making regarding reporting to the ICO.

Maintain records of data processing activities to demonstrate compliance.

Please see link to [Kirklees Council Data Protection Policy 2023](#)

Safeguarding:

Supplier must comply with safeguarding legislation and have an awareness of safeguarding principles and procedures through provision of training. They must have robust safeguarding policies and procedures in place that are clearly communicated.

Compliance involves implementing safeguarding policies, conducting checks and reporting concerns to relevant authorities, as outlined in legislation such as Safeguarding Vulnerable Groups Act 2006. The supplier must take reasonable steps to protect individuals from abuse and harm, especially when working with vulnerable groups (children or vulnerable adults), as you have a duty of care to the people who you come into contact within in a professional capacity. Steps must be taken to report any incidence to the Council as soon as possible.

The supplier must have clear reporting mechanisms for raising concerns about potential safeguarding issues to Kirklees Council. Please see link to Kirklees Council safeguarding policy – [Kirklees Council: Cross Council Corporate Safeguarding Policy](#)

DBS Checks

As valuers and surveyors may come into contact with vulnerable individuals (e.g., children or adults at risk), the supplier must ensure appropriate DBS (Disclosure and Barring Service) background checks are conducted.

Intellectual property

Valuations, appraisals and surveys carried out on behalf of Kirklees Council remains the property of the Council and must not be shared and/or disclosed and be safely disposed when the contract ends.

SECTION 4: TIMESCALES

10 working days turnaround time from instruction to provision of valuation and/or building survey report.

5 working days turnaround time from instruction to provision of general consultancy advice e.g. estimated property valuation to assess whether open market purchase viable.

To acknowledge and act upon Kirklees Council request within 24 hours of receipt via phone or email.

In exceptional circumstances Kirklees Council may have urgent instructions where valuation, appraisal and building survey reports need to be provided in less than the 10-working day turnaround to meet our deadlines to spend funding. You must be able to be flexible to be able to meet these revised turnaround times.

SECTION 5: PAYMENT

Payment of invoices to be within 30 days from date of the invoice by BACS.

SECTION 6: CONTRACT MANAGEMENT

To support effective contract management and ensure high-quality service delivery, the Supplier is required to:

- Submit fortnightly progress tracking reports via email to enable Kirklees Council to monitor performance against each Key Performance Indicators (KPIs).
- Attend monthly Microsoft Teams meetings with Kirklees Council to discuss performance, address any issues, and provide a dashboard update.

KPIs

The below KPIs measure the time taken to complete valuation, appraisal, and survey reports from instruction to delivery. Meeting agreed deadlines is essential for efficient service delivery.

Performance will be assessed against the following targets:

1. 10 working days turnaround time from instruction to provision of valuation, appraisal and/or building survey report.
2. 5 working days turnaround time from instruction to provision of general consultancy advice e.g. estimated property valuation to assess whether open market purchase viable.
3. To acknowledge and act upon Kirklees Council request within 24 hours of receipt via phone or email.

In exceptional circumstances Kirklees Council may have urgent instructions where valuation, appraisal and building survey reports need to be provided in less than the 10-working day turnaround to meet our deadlines to spend funding. You must be able to be flexible to be able to meet these revised turnaround times.

Monitoring these KPIs enables Kirklees Council to assess the valuer's performance, identify areas for improvement, and ensure the delivery of cost-effective services while managing public funds responsibly.

Customer Satisfaction

Customer satisfaction will also be reviewed during monthly meetings and assessed through the following indicators:

- **Seller Feedback:** satisfaction of residents who have been surveyed through feedback forms, surveys, or other mechanisms.
- **Client Feedback:** feedback from council departments and other stakeholders who rely on the valuation services, assessing their satisfaction with the valuer's performance.

- **Number of Complaints:** number and nature of any complaints from sellers about the valuer's services provide valuable insights into areas where the service can be improved.
- **Resolution of Issues:** look at how effectively the valuer addresses and resolves any issues or concerns raised by clients.
- **Positive Feedback:** track any positive comments or testimonials from sellers regarding the valuer's service.

Monitoring and Auditing

Kirklees Council will regularly monitor and audit the supplier's compliance with contractual obligations and performance standards. KPI performance, capacity/resource issues, and customer satisfaction will be discussed during monthly meetings.