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**Appendix 2**

# Lot 1 – Lot 2: Property Consultancy

## Scope of Services

The Consultant may be required to provide a wide range of property consultancy services across the UWTSD Group estate. This includes:

* Estate management
* Professional advice on title, boundaries, and legal matters
* Lease and rent negotiations (landlord and tenant roles)
* Sales and acquisitions
* Valuation for market, insurance, or financial reporting purposes
* While areas of responsibility may overlap, the overarching expectation is for consultants to act as trusted advisors, supporting the University’s strategic aims while working collaboratively with internal teams, legal advisors, and stakeholders.

Requirements described as ‘must’ or ‘shall’ are mandatory. Those described as ‘should’ or ‘may’ are desirable and context-dependent.

The Institutions may require ad hoc or project-specific work beyond what is listed, provided it is within the industry-standard scope of property consultancy services.

# Service Descriptions and Requirements

## Estate Management

* Budgeting and financial forecasting
* Service charge and insurance administration
* Maintenance and repair oversight
* Vacant property management (inspections, security)
* Revenue optimisation and cost control
* Tenant liaison and relationship management

## Property Acquisitions

* Identify suitable properties aligned with the Institution’s strategic aims
* Undertake due diligence (including surveys and legal reviews)
* Advise on terms and conditions
* Lead or support negotiations
* Liaise with solicitors and stakeholders
* Prepare business cases and acquisition reports
* Provide occupancy and suitability assessments

## Title and Boundary Advice

* Reviewing and interpreting legal property documentation
* Advising on registration, amendments, and rectifications
* Assisting with or managing disputes with third parties
* Producing factual summary reports, action plans, and negotiation strategies
* Supporting resolution through negotiation or legal processes

## Rent Reviews

* Provide an initial report with background analysis, risk, and options
* Lead or support negotiations to reach a fair market settlement
* Advise on appropriate lease terms and ensure documentation is clear and aligned with University policy
* Produce a final recommendation report with supporting rationale
* Coordinate with legal advisers as required

## Lease Management and Lettings

* Receive, record, and respond to letting enquiries
* Manage lease negotiations and advise on FRI, IRO, or ground leases
* Carry out tenant vetting (e.g. credit checks and references)
* Prepare and agree Heads of Terms and lease plans (aligned with land registry and legal standards)
* Manage lease renewals and ensure adequate notice periods
* Ensure tenant insurance obligations and statutory compliance
* Support the client in instructing legal services and completing lease documentation
* Ensure regular reporting and proactive identification of renewals or vacant opportunities

## Property Sales and Disposals

* Provide market valuation, costs, income forecasts, and risk analysis
* Advise on clawback or overage clauses
* Market the property, negotiate terms, and engage with buyers
* Liaise with solicitors to progress to completion
* Provide a final disposal report

## Valuation Services

* Market value
* Insurance purposes
* Asset and financial reporting

All valuations must comply with the most current edition of the RICS Valuation – Global Standards (Red Book) and relevant public sector financial reporting standards. Reports must include full justification and comparables and align with the Institutions’ accounting requirements.

## Contract Management and Relationship Development

* Consultant performance and KPIs
* Project updates and emerging issues
* Continuous improvement opportunities
* Two-way feedback

The University values partnership and encourages open communication, proactive engagement, and knowledge sharing across the consultancy relationship.

# Skills, Expertise and Collaboration

* Possess relevant qualifications and professional accreditations (e.g. MRICS, AssocRICS, IRRV, etc.)
* Demonstrate strong communication and stakeholder engagement skills
* Be able to provide clear, evidence-based advice to both technical and non-technical audiences
* Be familiar with the Welsh Procurement Act 2023 and demonstrate principles of fair work, sustainability, and value for money
* Be willing to collaborate with internal departments (Legal, Finance, Estates, Planning) and third parties as part of a broader project or asset strategy

# Collaborative Working and Governance

Consultants appointed under this Lot will be expected to work collaboratively with Institutions, fostering openness, knowledge sharing, and joint problem-solving. Core expectations include:

* Engaging constructively with internal client roles, including the Investment Decision Maker (IDM), Senior Responsible Owner (SRO), and Client Project Manager (CPM)
* Supporting cross-functional delivery involving stakeholders from Estates, Procurement, Finance, and Academic departments
* Representing the Institution in communications with contractors, regulators, and external partners
* Supporting post-project reflection, continuous improvement, and knowledge transfer

The appointed Consultant will play an essential role in facilitating communication and trust among all parties, helping to align project outputs with institutional strategy and long-term estate goals.

# Outcomes and Legislative Alignment

Services delivered under this Lot must contribute to the wider public good, in alignment with the **Welsh Procurement Act 2023** and the **Well-being of Future Generations (Wales) Act 2015**. Consultants are expected to demonstrate their contribution to the following outcomes:

* **Public Good**: Supporting social, environmental, and economic value through investment in the built environment
* **Value for Money**: Ensuring that projects are affordable, accountable, and effective
* **Sustainability**: Reducing environmental impact and contributing to carbon targets
* **Fair Work**: Supporting inclusive employment, ethical supply chains, and regional development
* **Transparency and Integrity**: Acting with professionalism, clarity, and fairness in all client relationships

Consultants should be suitably qualified and experienced, with professional accreditations such as RICS, CIOB, RTPI, RIBA or equivalent as appropriate to the services being provided.