

ACES TERRIER

THE ASSOCIATION OF CHIEF ESTATES SURVEYORS & PROPERTY MANAGERS IN THE PUBLIC SECTOR

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ACES TERRIER

The Journal of ACES - The Association of Chief Estates Surveyors & Property Managers in the Public Sector

EDITORIAL

Betty Albon

Welcome to the 2022 Autumn Terrier.

ACES National Conference on 15-16 September in Sutton, London was a welcome live event, three years since our last live one on the Isle of Wight. President Chris Rhodes and his team, with the able support of Sue and Andy from Frank and Brown, put on a varied programme, which involved much interaction from the audience, in Q & A and panel sessions. This issue contains a summary of the 2-day event, and some individual articles from conference presenters. I wish to extend a huge thanks to our Corporate Members and sponsors - particularly Platinum Corporate Member, Carter Jonas. Gold Corporate Members are Avison Young (also now an advertiser), Norse Consulting, and Lambert Smith Hampton. High Court Enforcement Group exhibited at and sponsored the event.

This issue also focuses on environmental and other sustainability challenges including biodiversity net gain, town centre regeneration and initiatives to encourage quality homes. Another professional topic is ways to improve the skills gap for the public sector – a recurring issue at the conference.

Hats off to the branches. I have a record number of submissions. Reading these illustrates the exceptional value of being an ACES member, who can benefit from participating in all the collaboration and professional input such meetings provide – as well as gaining CPD!

Please share ACES' Terrier with colleagues - in hard copy and online www.aces.org.uk/library/.

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Cover photo: Delegate shot, ACES National Conference, courtesy of Marcus Macaulay

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ACES NATIONAL CONFERENCE, SUTTON, LONDON "2050: The path to sustainable communities"

Peter Gregory and Betty Albon

Peter is a member of the North West branch of ACES and Past President 2019-20. He was the first ACES' President to preside over an ACES virtual conference.

This report is a summary of the presentations made at ACES Conference held at the Holiday Inn, Sutton, on 15-16 September. More detailed articles of some presentations will be included in this and Winter editions of ACES'Terrier. My sincere thanks to Peter for producing a comprehensive resume and helping the Editor considerably.



Welcome and introduction - Chris Rhodes, ACES President

Chris welcomed delegates to the conference and reminded them that we are living in the midst of momentous events. The ideology of service aspired to by ACES members was embodied in the person of The Queen. Chris asked the meeting to observe 2 minutes' silence in honour of her majesty.

Welcome to Sutton - Councillor Ruth Dombey, Leader, London Borough of Sutton

This is a solemn moment in our nation's history, an opportunity to reflect on the last 70 years, to pause and reflect and to witness ancient customs, meaningful tradition blended with modern day technology. This acts as a reminder of the importance of place and community.

The last few days and the Covid pandemic reminded us of the importance of community and the importance of place in our lives: we are all interconnected, but also demonstrated to us the importance of strong sustainable communities.

The Borough of Sutton is a series of villages – a sense of place has many different layers, with global connectedness. Covid and the loss of the Queen remind us that we are rooted in place and community.



All conference photographs courtesy of ACES' photographer Marcus Macaulay

For some years Sutton has been re-thinking the changing nature of work and how we use our town and district centres. Working in close partnership with the Royal Marsden and Institute of Cancer Research, we are developing the Cancer Treatment Institute, which will bring 13,000 new jobs, £1.2bn GVA and opportunities for life sciences in the economy. We have built a new secondary school to Passivhaus standards on the same campus, which is aligned to sciences.

Local government has a responsibility to develop strong and sustainable communities – environmentally, economically and socially; we have a commitment to face the challenges of climate change and to lead on changes to lifestyles.

Welcome to Sutton - Helen Bailey, Chief Executive, London Borough of Sutton



Congratulations on the conference agenda – sustainability is of critical importance. At a time when we are thinking about a series of big issues, this is the best possible time for a conference: a new government, emergence from Covid, new ways of working, cost of living crisis, climate emergency – how do they impact on public services?

ACES members understand council assets and their contribution. Sutton is thinking about how assets are used – looking at how we work, downsizing, making the best of the estate, using property ownership to meet the challenges. Assets and capital are our weapons where funding is a problem, ie



using public property for public good.

We aspire to lead on sustainability by making property fit for purpose; it is a huge challenge for ACES members. I pay tribute to Chris for his quiet leadership in Sutton's challenge.

How to create a sustainable community – Ronan Leyden, Director of Consultancy, Bioregional

[Ed – please see full article by Ronan in this issue of ACES' Terrier]

Ronan gives a practitioner's perspective with a focus on real estate and the environment, working with asset owners, BIDs, and local authorities.

His presentation looked at the themes – environment, society, economy and relevant legislation. He then introduced the concept of One Planet Living, the principles to be applied to the built environment, the process and 3 case studies – BedZed, Sutton Community Farm, and Saxon Court. All examples required local authority participation.

Question and answer session

There followed an extended Q & A session. Many of the points have been built into Ronan's article, including:

- What is triple bottom-line accounting?
- What are the three top tips for a change of financial mindset? Be a chameleon and speak people's

language; a local needs analysis that is evidence based, to justify decisions and non-financial options; a genuine personal conviction and passion

- How can you overcome organisational reluctance to see beyond the financials? Bioregional's partnership model is a JV development company around the concept of a community land trust. Securing a site is the main stumbling block because of the minefield of local authority procurement processes and a lack of understanding about what the best overall outcome might be
- How far will building regulation changes help? At the moment, developers see them as a problem which increases costs and puts pressures on the amount of affordable housing. Legislation is insufficient as it does not cover all carbon emissions. In practice, engineers and architects have moved beyond the legislation and are agreeing in collaboration to push towards higher standards, but as there is no legal obligation to do so, such initiatives are not reflected in reduced land values
- What are the factors that impact on re-use/retrofit or rebuild? It is important to consider a wider perspective – how to affect lifestyle choices and which choice represents the best long-term outcomes.



How can we deliver the renaissance of our towns, high streets and shopping centres? – Dr Steve Norris, National Head of Planning, Regeneration & Infrastructure, Lambert Smith Hampton

Survey findings 2020 and 2021

This presentation was based on the findings of research (including inputs from ACES members), looking at the challenges facing town centres. There were 300 responses to surveys in 2020 and 2021 [Ed – Steve has written a full article in this issue of ACES' Terrier].

Some of the challenges are once in a lifetime events, particularly the pandemic. Top challenges:

- High business rates, which take no account of business turnover, are out of step with the market, and are strangling the lifeblood of town centres. 80% of retailers could close down if business rates are not reduced
- Rise of on-line shopping, which accelerated in the pandemic. Forecasts of on-line share suggest 50% by 2030 (26% in 2021)
- Over-supply of retail floorspace, estimated at 20% and even up to 50% in some locations. Centres are being dragged down by vacant space – failing shopping centres with plummeting asset values. There are 16% voids on the high street

- Cost of living and energy crisis. Inflation is forecast to be 14% by December 2022, with interest rates at 3%. Businesses are on the precipice. It is forecast that 70% of pubs could close down in the winter of 2022/3.

- Lack of up-to-date plans and town centre strategies, coupled with additional controversial changes to permitted development rights and use class orders.

What is the optimum critical mix of uses and services that will support viability? Towns need to adapt and diversify, with flexibility to accommodate changing demands.

Which government interventions would be most effective? The 2021 survey suggested that business rates reform is the biggest single factor, coupled with an on-line shopping sales tax. It was felt that the government would not be forthcoming on either of these. Additionally, support/guidance for town centre strategies and masterplans would give a structure and framework for town centre regeneration. There is a need to engage with communities to produce champions, eg town boards for visioning leading to priority projects.

Steve outlined two case studies – Corby, a town formerly built on steel, the decline of which devastated the community in

Funding Sources

How do you intend to fund key Regeneration & Development projects in the next 5 years?

Funding source	2021	2020	2019
Joint ventures/partnerships	36%	38%	46%
Public sector (all/part) funding	30%	24%	36%
Levelling Up / Towns Deal / FHS Fund	26%	31%	n/a
Institutional investors/ private sector	18%	24%	24%
Grants	16%	24%	23%
s106/CIL	12%	12%	18%
Bank loans	10%	21%	17%
Individual wealth	8%	17%	6%
Public Works Loan Board (PWLb)	8%	14%	22%
Income strips	3%	4%	n/a

Government Funding Options

Fund	Objective	(£)
Future High Streets Fund (2018)	To renew and reshape town centres and high streets in a way that drives growth.	£1bn
Towns Fund (2019)	Economic regeneration of 101 towns.	£3.6bn
Levelling Up Fund (2020)	Supports investment in three key areas – (i) local transport projects; (ii) town centre / high street regeneration; and (iii) cultural and heritage assets. First round of the Fund allocated £1.7 billion to 105 successful bids. The 2 nd Round was announced in the Chancellor's Spring Statement (March 2022) and builds on the LUWP.	£4.8bn
Welcome Back Fund (2021)	To support the safe return to high streets and help build back better from the pandemic.	£56m
UK Community Renewal Fund (2021)	To prepare for the UK Shared Prosperity Fund	£220m
UK Infrastructure Bank (2021)	Investment in infrastructure assets that drive regional and local economic growth or support tackling climate change.	£22bn
UK Shared Prosperity Fund (2022)	Succeeds the old EU structural funds. Provides funding up to March 2025 focussed on 3 local priorities – (i) communities and place; (ii) support for local businesses; and (iii) people and skills. All areas of the UK will receive an allocation from the fund via a funding formula rather than through competition.	£2.6bn



the 1980s. Logistics, warehousing and residential have turned the area around, along with investment in community facilities, particularly the repurposing of a building for a new 6th form school and improved pedestrian/cycle connectivity between different town zones (station, town centre, residential, industrial).

Tilbury, which has a vision built around "Hub-Heart-Heritage". It looks to bring out the heritage and culture of the historic docks, especially for visitors by cruise ships. Plans are to improve public realm and create a safe environment, especially at the civic square. Funding will now be a challenge to deliver the project in its entirety.

In recent years 1 in 8 LAs have purchased 64 shopping centres, with a regeneration perspective, placing weight on social value. 1 in 3 shopping centre purchases in 2022 have been by LAs. Some shopping centres have had a renaissance due to repurposing and replacement, consolidating space to achieve social value, eg Stockton-on-Tees and Nottingham [Ed – see Steve's article].

Leadership and investment

Who will lead the renaissance? All sectors need to be involved, including LAs, property owners and investors, national and regional government, through a mix of JVs and partnerships, government funds, and public and private investment. Some funding opportunities are complex and long-term, rather than quick fixes (see page 6).

Some of the environmental and social value local interventions are seen as helping address ESG and climate change in our town centres - improve transport; carbon zero buildings; possible EV

infrastructure; promote 10-15-minute neighbourhoods; infrastructure for health and active travel; public realm/green space.

Looking forward, what have we learnt?

- Establish strong leadership and governance
- Involve communities and stakeholders from the start
- Develop robust evidence-based visions and investment strategies
- Repurpose unviable retail and office space, and shopping centres
- Replace with more flexible and diverse uses
- Introduce new homes with different tenures
- Invest in new physical/digital infrastructure
- Plan for more active modes of travel
- Restore civic and community pride
- Create beautiful, green, attractive buildings and places
- Build on the "walkable neighbourhood concept"

Panel discussion - Chris Rhodes, ACES President; Alan Richards, Southend-on-Sea Council; Steve Norris

This was the first of a series of discussion panels touching, in particular, on:

Issues and challenges – Southend is not

unique with issues of high vacancy rates, poor retail offering, public demand for good quality shops. Energy and other costs, including business rates, are significant for retailers; meeting MEES is a "ticking time bomb" and is likely to result in major ownership changes and challenges. But there are opportunities: the council has acquired a shopping centre for relocating services.

London is not in a privileged position: Sutton has the challenge of a linear town centre. The council has also recently acquired a shopping centre – rents and values had declined under the previous ownership with a loss of investor confidence, so the council acquired it at site value, based on an independent valuation (values plummeted from £120m to develop in the 1980s to £26m in the 2020s). There is opportunity to bring forward a major scheme with more of a civic presence on the high street, which would facilitate sale and redevelopment of the existing civic centre.

Funding - How can we make the finances work? Both felt that there are a whole range of financial models which work for different kinds of project. The public sector needs to take a different view of risk and reward and on what gains are achievable. Funding needs to unlock the vision for town centres, and demonstrate confidence to promote partnerships.

Steve countered that politics cannot be ignored. There is a shortage of resource in the public sector to take advantage of funding on offer, eg timelines are short, so funds end up not being spent, or not being spent in the right way. It is imperative to get the s151 officer on board.

What is a 15-minute neighbourhood - Katja Stille, Director, Tibbalds

What makes a 15-minute neighbourhood? It is a place for people to spend most of their time; it represents diverse communities in one neighbourhood; it means 15 minutes' walking time.



It is not a new idea, and was traditional before cars/personal transport created a spread due to the ability to travel to school, shops, and workplace. Now we know that it is not healthy for us or for the planet: transport is the second highest source of carbon emissions.

Carlos Moreno reinvented the idea of urban proximity, that it is better to live and work in the same place, avoiding travel and with all facilities in the neighbourhood. The pandemic has helped us to get the workplace in the neighbourhood, which was previously a massive challenge.

The health benefits include a reduction in obesity due to more active travel, with associated savings on health budgets (a 12% reduction in obesity could save £675m); a quality environment helps us to get out and walk, but improvements are needed to the built environment, so residents can just 'bump into each other'; economic benefits include boosting footfall for local traders and supporting high street employment.

To take the concept forward, we need to understand the needs of the neighbourhoods – amenities, services, social groups making up the community: a network of communities can be connected by good transport. Engaging with residents and stakeholders, identifying partners and opportunities, and communication are essential. LAs can deliver amenities and

Fifteen Minute City Revival – Carlos Moreno

- "We need to reinvent the idea of urban proximity."
- "We know it is better for people to work near to where they live, and if they can go shopping nearby and have the leisure and services they need around them too, it allows them to have a more tranquil existence."



Paris, Melbourne, Shanghai, Brighton, London, Rotterdam, Barcelona, ...

Key ingredients Melbourne



infrastructure by being proactive, eg using land and buildings for multi purposes at different times, use CPO powers, adopt regeneration strategies, etc.

There are risks of compounding gentrification, social divides and inequalities, so councils need to focus on the more vulnerable and lower income neighbourhoods.

Katja illustrated the principles and challenges with a case study of Salisbury, with people-friendly streets, improving green spaces and environment, and creating vibrancy – young persons' accommodation, night-time economy, etc.

Connecting our communities - Phil Jones, Phil Jones Associates

The biggest challenge is carbon. Transport is the largest contributor to UK domestic greenhouse gases: 55% of transport emissions come from cars and 60% of car trips are of less than 5 miles. We need realistic alternatives to the car (see image of 'Decarbonising Transport' opposite).

There are also a series of useful documents by the Department for Transport and HM Government supporting these policies. But Phil did question whether the government was being consistent with its investment proposals for new roads.

There is a challenge of making quality places, which should avoid car dependent urban sprawl. The 2022 report from Transport for New Homes stated: "the design and layout of greenfield housing...anticipated that residents would drive for nearly every



The Actual Plan – July 2021

- Long list of commitments including:
 - More walking and cycling
 - Zero emission buses
 - No diesel-only trains by 2040
 - Zero emission cars, motorcycles only from 2035
 - Non-zero HGVs only from 2040 (subject to consultation)
 - Consult on 'Jet Zero'
 - Carbon reductions quantified in Local Transport Planning/funding/transport business cases
 - Embed decarbonisation principles in spatial planning
 - Increase vehicle occupancy
 - Car clubs
 - Etc etc...

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Shrewsbury shows what can be done

journey they made." Phil illustrated this with a plan of a new housing area where barriers prevented pedestrian and cycle movement between roads, and had 'keep off the grass' signs on open spaces!

The "Manual for Streets 2007" is currently being revised. The principle is that streets are the arteries of our communities and have many functions. Their design should think about walking and cycling first, enhancing movement frameworks to incorporate desire lines, connectivity and linkages.

"Building for a Healthy Life" (Design for Homes) is a design toolkit for neighbourhoods, streets, homes, public spaces. It sets out what good and bad both look like (streets should not be designed around bin lorries!).

"Streets for a Healthy Life" (Homes England) is a companion guide to the above, aimed at new streets in new developments.

"Net zero Transport 2021" (RTPI) – the role of spatial planning and place-based solutions.

"Cycling and Walking Investment Strategy" (Active Travel England) – promoting accessible communities.

And finally, the Grimsey Reviews, with

the "Build Back Better" supplement for promoting public spaces, design and active travel.

Phil outlined many ideas taken from these publications - travel happens because people need to get somewhere – spatial proximity reduces the need for travel (as in the 15-minute neighbourhood); "the greenest trip is one not taken"; public transport is vital but needs to be able to compete with the flexibility of the car. For example, bus services create a tension between getting people near their destination and maintaining service efficiency; integrate cycling/walking and public transport, which require good cycle paths.

Working with biodiversity – Mark Russell and David Aldborough, Carter Jonas

"Natural capital" encompasses all environmental and natural assets of water, trees, soil, land - ecosystem services to support humanity and the economy. A monetary value can be placed on most of

these assets now, which can therefore be factored into the decision-making process.

The Environment Act will bring a new statutory duty of enhanced biodiversity. We will all need to think about reflecting natural capital. Local authorities are well placed to apply the principles: they should be encouraged to be involved and are used to managing public property for the public good.

Two county councils have been leading the way: Warwickshire, which adopted its own metrics in 2012 and Cambridgeshire which has been setting up its own land bank. However, there are barriers to implementation. Firstly, there can be conflicts of interest between land owner and local planning authority [Ed – David explores this in his 'Conundrums' article contained in this issue of ACES' Terrier].

Secondly, there are multiple inputs into the decision tree - archaeologist, landscape consultant, environmental consultant, public access, and tenants. Existing agreements between parties, particularly agricultural tenancies, just do not cater for this.

Thirdly, the links between biodiversity net gain and climate emergencies do not necessarily directly correlate. Policies are not linked on LA websites and the disjointed approach is driven by service area, not by overall need. How is this being communicated to the public? One IT tool which might help link carbon measurement on land is 'Downforce Technologies'.

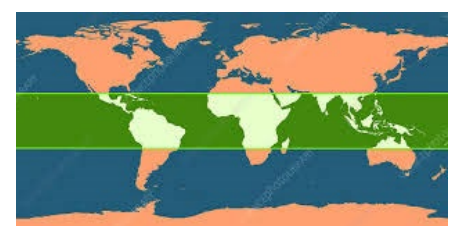
Mark and David finished their presentation by proposing that offsetting be considered on a global, not local scale, as their view is that there is not sufficient capacity in the UK (244,000 sq km). Why not offset in the tropics, which is over 53m sq km. Now there's food for thought.

Offsetting on a larger scale

UK 243,610 km²

Area of land within the Tropics 53,397,360 km²

219 times larger!





Panel discussion - Daniella Barrow, Norse; Mark Russell and David Aldborough, Carter Jonas; Katja Stille, Tibbalds; Phil Jones, Phil Jones Associates

Panel members discussed the challenge of how to achieve community buy-in. While citizens are now broadly aware and support environmental initiatives, there was still “pluralistic ignorance” to overcome. The best way forward was in educating young people, who have a much better understanding already; one panellist quoted his child: “daddy, turn the lights off to save polar bears”.

How can active travel/public transport work for all? Families can find it hard, but they manage to do it successfully abroad, eg in Copenhagen, where cargo bikes are commonly used (look at YouTube “Motherload”). A mindset change is needed to look at the bicycle as a means of transport, not for leisure/exercise. The 15-minute neighbourhood – or village – facilitate active travel.

How do we transition into developments that do not have car parking? EVs are environmentally friendly, but do not solve space, congestion or health issues. Car clubs should be welcomed.

Car parking is always a design challenge.

The market has traditionally fought against reduced provision, but there are recent signs of acceptance of higher density developments with grouped parking.

Local Plans can only accommodate demand for homes by taking greenbelt land, eg demand for garden villages. This conflicts with the 15-minute neighbourhood and encourages low density development. Are local plans out of date as far as densities are concerned? Planners need to hold their nerves!

Panel discussion - The future of the ACES profession - Neil Webster; Zaman Sheikh, Babergh & Mid Suffolk Council; Pooja Agrawal, Public Practice; Ros Goode, Avison Young

This was a far-ranging discussion which merged the views of both public and private sector panellists. Representatives of ACES were under the banner of FACES (the Future of ACES group).



Ros, as chair of 'Emerging Leaders', manages young professionals, many of whom are frustrated about the world of real estate; Poola, who works with local authorities to build staffing resources, quoted the culture of silo working between disciplines.

The key themes are open-mindedness; thinking outside the box; the role of the leadership of local authorities around social value; partnership working. It comes back to the mindset of the public sector, which needs to develop more confidence to take risks and to work more collaboratively. Sustainability is a means of leveraging people into the roles and it is frustrating that surveyors are not more visible, despite it being a great profession. Also, we need to remove the stigma from the construction profession – more than just a trade – it is a needed and valuable skillset.

More intervention at school level is necessary, together with adopting broader recruitment processes embracing diversity and inclusion. Local authorities face barriers around current narrow HR processes, adopting strict criteria, which might exclude a wide range of people, despite many skills being transferable. We have an obligation to show how people can contribute to the profession, how they can be part of exciting change/transformational projects.

Frustration was expressed about the limitations of the Apprenticeship Levy: the lack of funding is a massive barrier to the changes we want to make.

Neil drew the discussion to a close with his 'Call to action' of all the threads FACES should take on board.

Panel discussion - How was it for you? – Nicola Mathers, Future of London; Alexandra Houghton, Carter Jonas; Katja Stille, Tibbalds; Zaman Sheikh, Babergh & Mid Suffolk Council; Chris Rhodes, LBC Sutton; Helen Stubbs, NHSPS

So what key themes had emerged from Day 1 of the conference?

- Take a long-term view. All initiatives are long-term, but too many decisions are taken on the basis of short-term viability. There needs to be a recognised way of thinking about longer-term outcomes
- Collaboration and breaking down silos. Issues are so complex it needs all of us to address them. All regeneration projects should include all local authority departments sitting down together
- There is a need for diversity and inclusivity, which could bring a great deal to the profession. We need new ideas to meet the challenges and to bring in new talent
- Everything is connected: merging all concepts into decision-making is crucial. We need to deliver, not just talk
- Establish value, credibility and trust. In the wide range of issues we work on, we can feed off other professions. We need to be more visible against other professions, even though it is challenging to compete with eg law, medicine etc.

This is also a challenge for RICS.

Finance and funding: How do we get beyond the conversation?

- There are now so many recognised ways to measure things, eg the Green Book. However, principles are not always applied. Can local authorities recognise and apply these factors to decision-making?
- We need to establish the appetite politically – using skills and expertise to communicate
- We also need to identify a common measurable vision and be able to monitor steps against the vision. Processes tend to lead us to look backwards – we need to be more creative to identify how to get to where we want to be.

How can health and the high street be linked?

- We need to understand partnerships – look beyond the existing policies, identify blockages, get away from the traditional view
- Challenge the view that something cannot be done because it never has been before
- Covid has given us opportunities to change. Why are there still limits?

Breaking down barriers to public land issues: How can we get public authorities working together for the same goal?

- It is difficult to persuade people to work together for social value



- We need the mindset to push against ways of thinking and need a shift change in each organisation
- Decisions can be blocked by risk avoidance. Without convergent interests it is difficult to move forward
- It needs leadership and vision to break down the competing interests.

Look North: Wrap up from the 2023 President – Helen Stubbs, NHSPS



Helen's "Focus on Health" speech follows this conference write up.

Housing – Daniella Barrow and Richard Gawthorpe, Norse Group; Paulette MacAllister and Steve Sumner, Brentwood Borough Council

The panel considered how the council could deliver a sustainable and affordable development in Brentwood. The council is aiming to develop 300 new council homes

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PANEL SESSION

STRATEGIC HOUSING DELIVERY PROGRAMME

Re-purposing and regenerating a HRA site in a walkable neighbourhood.

CHAIR:
DANIELLA BARROW
Senior Director
Norse Consulting

PANEL:
STEVE SUMMERS
Strategic Director
Brentwood Borough Council and Rochford District Council

PAULETTE MCALLISTER
Programme Lead
Strategic Housing Development Programme

RICHARD GAWTHORPE
Group Director
Norse Group



in the next 5 years. There is a housing need, despite being affluent, with pockets of deprivation. The council stock is in poor condition; new homes are part of the council's key priority and vision; 88% of the borough is green belt.

There is a desire to align housing development to the climate change programme, which comes with a cost. Other financial barriers are the cost of living and costs of service delivery. Therefore to deliver, members need to be on board, with officers' ambitions aligning with those of members. Partnership working with residents and technical experts was key.

To be viable, the affordable housing programme needs HRA funding. The council remodelled the fund (maintenance budgets, etc) to make sure it could support the programme. A £70m programme has been put together over 6 years, with members and the finance team working closely together to produce a stepped investment period delivering homes and additional income.

Because of the green belt restrictions, the council's programme focuses on brownfield land, such as garage sites in existing housing areas, although this makes regeneration more challenging: redeveloping older housing and together with RTB owners dictates land ownership is not absolute - the council is not initially in full control of the land. Sites often include many vulnerable residents. The project team needs to understand the impact on peoples' lives and the impact of moving them from their homes, so provided community support through a dedicated team and a programme of community involvement.

Case study - Brookfield Close

Development principles were embedded in the strategic plan – net zero, parking reductions, biodiversity net gain, to create a nicer place to walk through to access local facilities. As part of the viability assessments, the team wanted to test zero carbon impact on the public purse – the 'social return on investment' – e.g savings for the NHS, fuel poverty, rent arrears, healthy homes. Officers involved the whole community, including the young.

The design journey involved meetings with technical teams and a design review panel to test the design, which consulted widely. The council wanted to exceed minimum space standards and provide shared space; to use high-quality materials and so improve maintenance cost effectiveness. Total demolition gave way to part refurbishment, to reduce imported carbon, and to accommodate existing residents.

Final design – 46 flats, 16 houses. 70% affordable let on social rents; 30% open market sale.



The council's philosophy of exceeding standards is built around climate change – to deliver increased levels of quality housing to high environmental standards and achieve better quality living. However, there can be a performance gap, ie, energy consumption can be up to 5 times higher than anticipated due to poor workmanship, which the council wanted to avoid. Contractors with the appropriate skills were chosen carefully.

The building regulations minimum standards are not seen as narrowing the performance gap. Norse has brought its expertise to Brookfield Close:

- Fabric-first approach using Passivhaus
- Masterplan eg orientation/form factor, has impact on energy use – scheme is linear to harness south facing benefits
- Careful use of technology – too many renewables can create problems. Passivhaus is net zero ready – PVs, ground heat source pumps, energy self-sufficiency.

What are the main takeaways?

- The importance of the collective effort - the 'landowner' working with the LPA on orientation issues; training; relationships with residents and tenants and getting them on board to promote the scheme; sharing what is being done and why; buying owner occupied units by agreement (CPO in the background) and encouraging them to relocate into the scheme (full decant is expected Spring 2023)
- It is right to be ambitious and to be clear on outcomes to be achieved
- Partnerships are critical.

For the future, the council aims to complete its programme on current sites and additional acquisitions: 80 garage sites are being reviewed, but it is actively looking for land. However, high land costs are a challenge and could affect viability. The council is seeking to be proactive with landowners in order to get into a position to acquire. A wholly owned company is used as a vehicle to purchase.



Social value is the answer – so what is the question? – Olivia Jackson, HLM Architects

[Ed – a full article written by Olivia will appear in 2022 Winter Terrier]

Social value is not a bolt-on for sustainable communities. A model exists for social value and contains 5 key themes which lead to sustainable strategies and decision-making. These in turn need a social system to support them:

- Covid 19 recovery showed social fault lines
- Fighting climate change requires a broader set of questions around sustainable design, eg 15-minute neighbourhood
- Equal opportunities – levelling up? Community and businesses need integrated solutions into the community

- Wellbeing and a move from reactive to preventative care and making health and wellbeing a daily conversation
- Tackling economic inequality, which is linked to healthcare and sustainability.

The discussion which followed centred on the practical challenges of how do we maintain conversations around these goals? We can engage people around the principles rather than around more prescriptive design.

The importance of taking the stress off the health service was seen as paramount, with preventative measures preceding primary care. Some examples quoted were the Bromley by Bow Centre [Ed - featured in Olivia's forthcoming article] and North West Surrey Alliance (<https://www.northwestsurrey-alliance.org/>).

Biodiversity – Sara Cameron, Babergh & Mid Suffolk DC; David Alborough, Carter Jonas

Sara set the context for the district, outlining public land ownership (predominantly countryside and open space) and the strategic context – neatly rolled into the diagram featured here, which also outlines the council's commitments to reducing carbon and increasing biodiversity.

The asset challenge is how to reduce the current 4 operational depots, each of more than 50 years old and located in residential areas, to a more sustainable solution.

Sara provided a client brief and David assessed the options available. The answer



Strategic Context

- Corporate Outcomes
- Service planning – one organisational approach
- BMSDC declared Climate & Biodiversity emergencies in July 2019
- Carbon Reduction Plan adopted August 2020 & Biodiversity Action Plan adopted January 2021
- Strategic Asset Management Plan adopted January 2021



used to be easy – consolidation of services on a new site followed by the disposal of the old. The Environment Act, climate emergency, and social wellbeing have changed things. Any solution needs to consider:

- Policies and ambitions
- Net zero targets/carbon reductions
- Financing structure – net income streams
- Climate change/resilience
- Community impact – high or low visibility
- Measuring current carbon emissions to baseline
- Natural capital increases - 20% BNG target.

Plans are at an early stage, but there is an emerging option. Why not use a greenfield site rather than the predictable brownfield and then combine it with a solar plant to make it self-sufficient in energy? Why not build electrical vehicle infrastructure into the solar provision? And what about including allotments, an accessible green space, a pocket park? The facility could be open to the public, have a viewing area and use it for informing the public?

Of course, there needs to be political buy-in to developing around 10 acres of greenfield land. There has been a shift politically towards Green party members, and an election is due in 2023. But an interesting journey is ahead [Ed – maybe material for a future Terrier article?].

Need support? We've got you – Juliet Smithson, Lionheart

Lionheart exists to help RICS members, but has separate governance and finances from RICS. It provides complimentary flexible support for all RICS professionals and their families to help them overcome life's challenges during their whole career and beyond.

Covid 19 was a crisis requiring a benevolent fund. The pandemic brought a massive uptake of help – in 2020/21 Lionheart provided 10,000 acts of support and a 400% increase in its audience, particularly for APC candidates.

Lionheart is providing new services, including coaching, youth counselling for members' families, where schoolchildren have particularly found pandemic life difficult; support for APC candidates,

students and apprentices, whose work lives have been disrupted; and enhanced global access to services. Lionheart is continually innovating to make its range of services relevant. For example, it is launching webchat and apprentice webinars, couple counselling, and dealing with coping with the menopause, and offering 25% grants to help Ukrainian members relocate.

No one is just a number. This was outlined by two case studies, which illustrated the range of bespoke services provided, including emergency grants, grants to cover income drops, back to work assistance, and counselling sessions.

Juliet thanked the audience who had donated with their RICS annual membership, and to consider donating online or by legacy www.lionheart.org.uk/support-us and www.lionheart.org.uk/remember-us-in-your-will.



COVID update and 7 cases

- Covid update

- The cases:

1. Bank of New York Mellon (International) Ltd v Cine-UK Ltd; London Trocadero (2015) LLP v Picturehouse Cinemas Ltd and others – pandemic rent defences
2. Faiz and others v Burnley Borough Council (CA) [2021] EWCA Civ 55 - forfeiture - waiver
3. Keshwala and another v Bhalsod and another (CA) [2021] EWCA Civ 492 - forfeiture – relief from forfeiture
4. Vectis Property Company Ltd v Cambrai Court Management Company Ltd [2022] UKUT 42 (LC) - landlord building upwards
5. Capitol Park Leeds plc v Global Radio Services Ltd [2021] EWCA Civ 995 - lease break option
6. W (No.3) GP (Nominee A) Limited v JD Sports Fashion plc – turnover rents in lease renewals
7. Valley View v NHS Property Services Limited – tenancies at will and 1954 Act rights

10

The legal perspective – Antony Phillips, Fieldfisher

[Ed – a full article written by Antony will appear in 2022 Winter Terrier]

Antony used his well-rehearsed format to update delegates – after 10 years presenting at ACES' conferences and AGMs!

An update on legislation on Covid led to his first case concerning pandemic rent defences. The summary of acts and cases summarised are shown in the slide and cover the usual range of waiver of and relief from forfeiture, lease break options, turnover rents, and tenancies at will/protected tenancies.

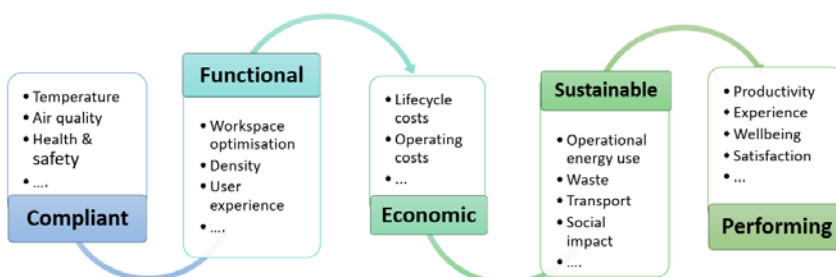
Rather than misrepresenting Antony, no attempt is made here to summarise the cases.



Harnessing the International Operations Building Standard (IBOS) – Paul Bagust, RICS

IBOS was published in February 2022 and aims to deliver an international standard for the operation of buildings to meet the needs of occupiers, investors, advisors and end users, by providing a global benchmark for delivering better buildings for people, society and the planet [Ed – see also Paul's article on IBOS in 2022 Spring Terrier].

Property has never been more important – there are new opportunities as the industry is being asked to do so many things. IBOS answers the question of what we measure as a profession: data led and people centric. Buildings are evolving, from architectural statements of power and capital/income investments, to consider their impact in an environmental crisis, health and wellbeing, productivity, business/economic success and for local



economies and communities. How they provide their experiences for users and tenant demands are changing.

IBOS is based on Maslow's hierarchy of needs applied to buildings, through the themes of compliant, functional, economic, responsible, productive and stimulating. It cuts across different audience segments and across the building life cycle and includes non-traditional stakeholders, such as technical providers, certification bodies.

IBOS establishes maturity levels – Undeveloped through to Advanced, depending on monitoring, benchmarking and reporting to stakeholders. RICS is developing an online self-assessment tool which will support organisations which wish to measure operational performance of their property assets in a consistent manner. Paul welcomes input from ACES' members as IBOS evolves.

Panel discussion - Reflections on the conference – Paul Bagust, RICS; Daniella Barrow, Norse Group; Alexandra Houghton, Carter Jonas; Helen Stubbs, NHSPS

How do we take forward the themes of the conference?

The importance of conversations has

been a constant theme. We need to engage with communities, be brave and talk face to face, thus building collaborative networks and involve communities so they also own decisions.

The RICS must also be braver, to engage its members. It is a conservative profession, which is reluctant to push itself forward. Post-Bichard we need to make bolder decisions and reflect the pride of its members. The RICS is heavily involved in government policy and needs to take the opportunities afforded through the changes to the built environment.

Partnerships. The importance of health in the community and the difficulties of making that happen. How can NHS become more aligned in the property arena to change things? Funding is too time limited; talking to the right person is very difficult; conversations need to be more 'grown up'. This will be Helen's theme [Ed – see Helen's address which follows].

Will the property world become more sustainable? How do we get key developers to change the way they develop? Place shaping is the key. Much is riding on public demands, driven by peoples' wellbeing and health, and pressure from communities, especially younger people, who are environmentally aware. However, the capitalistic economy is a real challenge to overcome, although

investors are also being scrutinised for their social value credentials - many are aware of reputational risk if they do not embody these principles. ACES has a role to play at this level.

The surveying profession must adapt to facilitate young people to make a career in the built environment. Alternative pathways are essential, something RICS is developing.

President's closing remarks

A few final observations before we go our separate ways. We have heard a fascinating range of topics, thanks to the knowledge and skills of our speakers and panellists. It has been wonderful to meet in person again and I really hope you've all found it as useful as I certainly have. We've also benefited from networking opportunities and those two things together are the whole ethos of the ACES conference and the reason we run them.

Thank you for the great feedback we have received so far on content and I know that lots of us enjoyed the dinner last night at Nonsuch Mansion. Feedback is welcome for future events.

Now we've hopefully moved out of the pandemic era, we will be running more conferences - next year it will be in the north-east and led by Helen Stubbs, our





incoming president. It's possible that the venue will be York and that's very easy to get to.

My main takeaway from the conference is the breadth of skills and experience we have between us and the opportunity that gives us to help deliver policies and services on behalf of our respective employers. We should take a moment to congratulate ourselves and each other on that; however there is always more to do, especially the many challenges around the economy and climate change. We know we will continue with our efforts and ACES will continue as the network supporting them and you.

Please take this last opportunity to speak to our sponsors who have enabled the conference to go ahead and keep costs down, also remembering Lionheart who are with us today. If you haven't yet done so, please pick up copies of ACES' Terrier from the ACES desk. I couldn't help noticing that the largest and least popular pile was the one with me on the cover - which comes as no surprise - but as usual, there is lots of really good stuff in there as well.

The main thing I really must do at this point is thank a lot of people for making the conference happen. All our knowledgeable speakers and panellists who have given their time and expertise.

All our sponsors, Carter Jonas, Lambert Smith Hampton, Avison Young, Norse Group and HCEG. It was never going to be possible for me to organise this solo due to my day job, and the fact that we had a conference is largely due to the local organising team of Neil Webster, Neil Simon, Alan Wharton, Ade Adebayo and Marcus Perry, supported ably by the ACES core team of Trevor Bishop, Willie Martin and Betty Albon. We've also been assisted greatly by our external organisers Frank and Brown, represented by Andrew and Sue today.

Of course the whole point of the event is for you, the delegates, so thank you all very much for coming and for your support. I look forward to seeing many of you in November in Cardiff at our AGM.

I hope you all have a good journey home, thank you all once again – conference closed!



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MORE PHOTOS OF CONFERENCE
MOMENTS ON PAGE 82



Helen is Senior Transaction Manager at NHS Property Services and Senior Vice President of ACES.

FOCUS ON HEALTH 2023

An introduction to the areas of focus in my presidential year

Helen Stubbs, Senior Vice President

Before I begin, I would like to start by thanking each of the speakers for their presentations. We really appreciate that you have taken the time out of your diaries to present to us. I would also like to thank you all as attendees for making the conference a success – your continued support to ACES, whether that is as a member, sponsor or contributor is hugely appreciated.

The brief for my presentation was to introduce myself to you all in my role as the next ACES President for when Chris hands over the baton in November, and to talk about some of the areas of focus that I would like to bring to my year in post [Ed – please make a note in your diary of Thursday 17 November at Cardiff City Hall].

Working for NHS Property Services, my focus as President will naturally be on health and how public sector property can support the NHS and the health and wellbeing of individuals. The move to Integrated Care Systems and Integrated Care Boards at the beginning of July provides the ideal opportunity to develop the relationships between the wider public sector and health, and opens up avenues to use or share assets for mutual benefit.

However, ACES itself has a huge role to play in supporting this agenda, by encouraging, supporting and welcoming to the ACES family the health estates managers, many of whom are not surveyors and don't have a property background – but nonetheless are managing multi-million pound property portfolios. When you look at job adverts for NHS Estates Managers, they invariably state applicants must have a facilities management or construction/capital programming background, and then a throwaway line at the end “and if you can negotiate leases and licences, acquire new

premises and dispose of surplus assets, achieving best value along the way, that would be useful” – so they clearly need our help.

I am being a little bit flippant there, but a key objective for myself next year is to increase the health sector membership – so if you know of anyone who may be suitable to join ACES, then please do let me know.

When I agreed to do this session I thought that a brief introduction to levelling up and how it supports the health agenda and use of public sector assets would be interesting for the audience. This was in June – little did I know that between then and now we were in for a change in Prime Minister (although to be fair that was probably easy to predict) and we don't know yet if levelling up is still a focus for the new government: we are on our 3rd Health Secretary and 3rd Housing/Levelling Up & Communities Minister, and have also had the revelation from Rishi Sunak that levelling up wasn't as everyone thought, and was really a ruse to bring more money to the Home Counties. All in 3 months. Nonetheless, even if levelling up as a policy is phased out, its relationship to improving health inequalities and using public sector property to do this is still valid and can be taken forward, with or without a Minister for Levelling Up (currently Simon Clarke, MP for Middlesbrough South & East Cleveland).

So where do we start?

On very broad terms, levelling up means addressing the nation's inequalities; it is not just focussed on North versus South, but addresses the inequalities within regions and within districts and boroughs. Health Inequality is just one

of a range of issues that need tackling and although you might just think, “that’s an NHS issue, it’s not for me”, public sector property and public sector asset managers can assist with reducing the gap in health inequalities.

So what do we mean by health inequalities?

NHS England states that *“Health inequalities are unfair and avoidable differences in health across the population, and between different groups within society. The conditions in which we are born, grow, live, work and age can impact our health and wellbeing.*

For example, someone who is unemployed may be more likely to live in poorer quality housing with less access to green space and less access to fresh, healthy food. This means some groups and communities are more likely to experience poorer health than the general population. These groups are also more likely to experience challenges in accessing care.

People living in areas of high deprivation, those from black, Asian and minority ethnic communities and those from inclusion health group, for example the homeless, are most at risk of experiencing these inequalities.”

How therefore can we use our properties to assist with reducing health inequalities?

There are a number of ways in which our property can support - and it’s probably a whole conference in itself - but by way of a few examples.

Picking up on one of the themes from Thursday morning - high street regeneration - bringing health onto the high street is starting to become a viable proposition with mutual benefits. ADP Architecture in its article for the EG in April 2022, identified that circa 1.25m sq m of new health space is likely to be required over the coming years, with approx. 1m sq m required to move outpatients and community services out of hospitals to free up space for acute services (ie surgery). The circa 1.65m sq m of vacant retail space offers a huge opportunity on both sides.

Co-locating health services into retail premises, such as existing shopping centres, benefits both parties. The health partners benefit from premises that are strategically located with good vehicular and pedestrian access, potentially slightly reduced conversion costs against new

build, and potentially lower rents as the retail landlords are keen to secure health tenants, many of whom effectively come with a government backed covenant; thus increasing the footfall to the premises, reducing void space and reducing rates liability. In addition, retrofitting and refurbishment rather than new build supports sustainability and the NHS Net Carbon Zero agenda.

In the last 18 months, a number of projects have been seen to completion across the country, some of them NHS led and some local authority or retailer led, and I am currently working on 4 individual projects to relocate GP, outpatients and community services into existing surplus retail space with a combined footprint of about 10,000 sq m.

Another route is to use existing public buildings for non-clinical interventions and community service provisions, such as the roll out of the Covid vaccine delivery, which resulted in a huge variety of easily accessible public buildings being used, including libraries, sports halls, community centres, etc, as well as within empty retail space. Smoking cessation, weight loss clinics, and so on don’t require a clinical setting, basically just a warm room, and some services such as mental health actively benefit from not being within a clinical setting and the stigma or associations that that can trigger for those who need mental health support. Underutilised public sector property can be repurposed for a few hours or days a week to support these services.

Alternatively improving the public sector housing portfolios to provide modern, fit for purpose social housing will contribute to the agenda, by ensuring that residents who rely on rented accommodation are not in sub-standard space which then exacerbates health conditions such as chronic pulmonary disease, and thus increases the referrals to the NHS.

And my last example - by improving and creating green spaces and networks within our towns and cities, reducing traffic congestion and pollution, and just generally making places a nicer environment, supports improvements in the residents’ and locals’ health, even if they don’t actively cycle every day.

I thought I would finish by giving some examples of how NHS Property Services is using its portfolio to support health inequality reduction:

- We’re creating health in local communities, working with our customers to use the NHS estate well and invest in our properties to help reduce health inequalities. This includes spending 70% of our investment in areas with high-medium deprivation
- We support and advocate for local communities and the specific issues they face. We create social prescribing hubs and transform green spaces to ensure people have access to a range of non-clinical services to improve their overall wellbeing
- Our Green Plan sets out how we’re working towards being net zero carbon by 2040 and helping to create greener and healthier communities. This includes reducing our carbon footprint, which will contribute to better air quality and adapting for climate change, to ensure our healthcare facilities across the country are sustainable and continue to deliver vital health services.

They are all clearly high-level concepts and not all will be applicable or achievable in each locality, but for those of you thinking about where do I start/how can our property assist, they provide a starter for 10.

Thank you.

NATIONAL CONFERENCE 2022

Report on the Social Programme

Marcus is a member of the London branch of ACES and long-standing member. He was part of the Presidential team, to organise the social programme for partners of delegates.

Marcus Perry

The non-business side of this year's Presidential Conference started on the Wednesday evening and continued until Friday afternoon. I report below on the various venues which made up this year's programme.

Wednesday evening

Conference tradition is to hold an informal dinner for delegates arriving the day prior to the conference. It was held at the Spaghetti Tree Italian restaurant, Sutton: 29 of us spent a very enjoyable evening. Ordering drinks was a bit haphazard at the start, but the waiters soon understood their guests wanted to celebrate, having not met up at a live event for three years. The food was delicious, the service excellent and friendly, and the evening was a big success. Well done and thank you to our President for his excellent choice of venue.

Thursday morning

Visit to Polesden Lacey, Near Dorking, Surrey. Weather, overcast at first then sunny and pleasantly warm. 18 social delegates assembled in the foyer of the Holiday Inn and waited for our coach to arrive to take us to the National Trust's Polesden Lacey estate. Following a minor glitch concerning the coach pick-up point some minutes' walk from the hotel, the coach drivers were brilliant - bang on time for all visits and departures and the shuttle for the conference dinner (see below) also worked very well. I sent a thank you note to Edward Thomas & Son, the coach company.

Arriving bang on time at Polesden Lacey, most of us headed first for the main house for a 'diy' tour. The National Trust volunteer guides were very helpful and keen to answer our queries and relay their knowledge. One

in particular, a biographer of Mrs Margaret Greville, the society hostess and last private owner of the estate, was so enthusiastic about her subject we had to force ourselves away: otherwise, we would still be listening to her hours later.

The panoramic views from the house over the 1,400 acres of the estate were delightful in the late summer sun. On then to the NT cafeteria, where the manager had kindly reserved tables for us, and we enjoyed a good luncheon.

Thursday afternoon

Visit to Denbies Vineyard, Near Dorking, Surrey. Weather mostly sunny and warm. On arrival, we boarded the vineyard train for our tour of the estate. We gradually climbed up onto the North Downs Way above the vineyard, where the train stopped for us to enjoy the magnificent view of Dorking and Box Hill. Geoff, our driver and guide then produced bottles of sparkling white wine for us to enjoy while doing so.

Back at Denbies visitor centre we went straight into our wine experience and tasting tour – and what fun it was. Our guide Mona was so enthusiastic about English wine and the wines produced by Denbies and we enjoyed her dry wit as she opened a generous number of bottles for us to sample. Well satisfied, we returned to the visitor centre's shop where some of us bought bottles of what we had just sampled.

Thursday evening

Conference Dinner at Nonsuch Palace, Nonsuch Park, Cheam, Surrey. We mustered around 85 for the conference dinner (business delegates, social delegates, sponsors, speakers and guests). The same coach company put on a 53-seater coach



Nonsuch Palace

for a shuttle service from the Holiday Inn to Nonsuch and back, and this worked well. A thank you goes to driver Anthony who expertly manoeuvred his coach through some very narrow gateways and entrances leading to Nonsuch Palace.

The conference organising team had scaled back the dinner from a celebratory gala event with entertainment to a lower key dinner, out of deference to the late Majesty Queen Elizabeth 11. While we enjoyed some excellent canapes and refreshments, two lady musicians dressed in Elizabethan garb played some strange sounding instruments.

Into dinner. We were seated mostly at tables of eight. The food was good and service efficient and friendly. Many chose to take the first coach shuttle back to Sutton, after having had a full day of conference and socialising. However, back at the hotel, a number of us enjoyed a nightcap at the bar before we were moved on to another area on the ground floor. Hint – time to retire to bed.

Friday morning

Visit to Dulwich Art Gallery, Dulwich, South East London. Weather mostly sunny and warm. We were down to 14 now as 4 had to leave early to travel home. Our coach arrived bang on time to take us through south London's boroughs to Dulwich. Full marks to our driver for battling through traffic to reach the gallery spot on time for our booked guided tour of the gallery. For those of you unfamiliar with this gallery, it is small but packed with some glorious works of art. The building itself is well designed, with roof lights providing just the right amount of light to display the art. Our guide, Caroline Lound, gave us a perfect tour; she concentrated on a handful of the pictures and the hour she gave us sped by.

In the grounds of the gallery is their upmarket café and as at Polesden Lacey, the café manager had kindly reserved tables for us in an otherwise busy café. We enjoyed a good lunch before some of us returned to

the gallery for a further look at the art on display, while others enjoyed sitting in the gallery's garden in the sunshine. The return journey back to Sutton took a different route.

Farewell and goodbye

Back at the Holiday Inn we found a few of the business delegates still on the premises, but most by now had left after their own luncheons. It was time for the social delegates to say goodbye.

Due to a lack of interesting venues on Sutton's doorstep – except for Nonsuch Palace – we had to travel a little further afield, hence the need for the coach travel. This apart, my companions seem to have enjoyed the social programme put together for them.

Onwards to 2023 and next year ACES' President's patch in the North East branch area.



NATIONAL COUNCIL

Notes of ACES Council Meeting on 15 July 2022 (hybrid)

Trevor Bishop, ACES Secretary secretary@aces.org.uk

This was the second live ACES Council meeting since the pandemic and was held at County Hall, Preston. 23 members attended the meeting in person or remotely, making the meeting quorate.

Before the meeting commenced, a minute's silence was held in memory of Remo Verrico, past president of the Association.

Detailed reports on the majority of these topics are published on the ACES' website www.aces.org.uk

President's report

The President, Chris Rhodes, reported on his activities since the last meeting, particularly in relation to the conference (see below). He had attended several branch meetings and had enjoyed them all, with many interesting presentations. Appointments had been made to complete all the branch visits by September.

Secretary's report

The Secretary reported on matters arising during the period since the last Council meeting. He provided the latest statistics on membership, which showed a reduction in membership numbers since the last report. There was discussion on the reason for the fall off; this was regarded as a combination of financial and workload pressures.

On subscriptions, the Secretary confirmed that at the time of reporting, over 93% of invoices had been paid, producing an income of approximately £37,300 out of a total due of around £40,200. Branches were

asked to chase up the non-payers, following which, final notices would be sent out.

The Secretary referred to his support to the President in arranging the 2022 Conference and was looking forward to a live event again. Equally, it was noted that the 2022 AGM would soon follow the conference and the Secretary reminded members that the Cardiff venue was one not to be missed.

The Secretary concluded by thanking again the numerous ACES officers and members that had helped him carry out his duties in recent months.

Financial matters

The Treasurer, Willie Martin, presented a report on the financial position. ACES continued to find itself in a healthy financial position, with no major issues facing the Association. Notably, ACES continued to benefit from the SAM Diploma course. There was a modest reduction in both income and expenditure against the budget predictions and these were detailed in the appendices.

With regard to membership subscriptions for 2022/23, and given the fact that there is no anticipated significant demand on these monies, the Treasurer noted that it would be difficult to recommend an increase in subscriptions. A nil increase in membership subscriptions was agreed for formal approval at the 2022 AGM.

The Treasurer also referred to the recent increase in the cost of motoring and that the mileage rate for ACES had not been changed since 2009. It was noted that past practice had been to adopt the HMRC's

Approved Mileage Rate for cars and this should be taken up with effect from 6 April 2022. This, together with the HMRC's rate for motorcycles and cycles, was approved.

A detailed report with appendices from the Treasurer is published on the ACES website.

Resignation of Honorary Treasurer

The Secretary reported on proposals and steps taken to appoint a new Treasurer on the retirement of Willie Martin. It was noted that while full details had gone out to all ACES members, the Secretary had not received any applications for the post by the due date.

The next stage of marketing the position was discussed. A further request would go out to members initially and then to the wider market if there was no interest from members. This would include, inter alia, colleagues of members.

ACES' website

The Secretary reported verbally on matters arising with the website. He commented that, notwithstanding minor issues, and thanks to matters addressed by Marcus Macaulay, the website was functional and providing the facilities expected. However, he noted that the usefulness of the website to the Association did depend to a large extent on members using it, posting forum items, using the jobs page, and adding news items.

Consultations

The Senior Vice President, Helen Stubbs, reported that consultations had again been few and far between. The only consultation dealt with since the last Council was from the DLUHC on proposed reform of Compulsory Purchase Compensation. Responses to this from members had been limited, but it was noted that former President, Simon Hughes, would be picking it up again.

ACES' Terrier

The Editor, Betty Albon, referred to the recent publication of the Summer Terrier which had been uploaded onto the ACES website. She was preparing for the Autumn 2022 edition and put a call out again for articles from members and branches and commented that early articles were always helpful to her to avoid a last-minute panic.

Business Plan

The SVP reported on progress and thinking regarding the review of the Business Plan. It was clear that this was continuing to be a momentous task and timescales were needing to be reviewed. Helen tabled a report, following her recent full consultation of members and this provided much detailed commentary on their views of the way forward. She also tabled a progress report with a number of key recommendations for Council. It was agreed that Council would be given more time to respond to the latest proposals.

Keith Jewsbury advised that the proposed changes to the Constitution can only be approved at the national AGM. It was proposed and agreed that, once further responses had been received from Council members, the Core Management Team would work to finalise the Business Plan and report back to Council, and ultimately the AGM.

The Head of Engagement, Neil Webster, reported on recent matters he had been progressing. Clearly, a great deal of time had been spent in supporting the President with the National Conference and ensuring our partners and other contacts were aware of, and marketing, the conference. In the absence of the appointment of a Sponsorship Officer, on the back of excellent work done by the Sponsorship Task Team, he had been able to progress the matter of sponsorship, both for the conference and beyond, and also the development of

Corporate Membership of ACES. This effort had started to produce fruitful results with a number of the key property firms signed up for full and long term packages.

Annual Conference 2022

The President reported on progress made with arrangements for the 2022 Conference [Ed – see conference write-up in this issue of ACES' Terrier].

As noted above, substantial progress had been made with reaching agreements with prospective Corporate Members. The packages would include the usual benefits enjoyed by conference sponsors, with a hierarchy of benefits and priority marketing depending on the level of support agreed.

Marcus Perry reported arrangements for the Social Programme were firmly in place.

The President again thanked the Conference team who had done an enormous amount of work to assist him in pulling all the essential elements of the conference together.

AGM 2022

The Secretary re-affirmed the booking of the rooms at Cardiff City Hall for the 2022 AGM on Thursday 17 November 2022. It was noted that Simon Hughes was in contact with the VOA with regard to providing a speaker for the meeting. The Secretary was confident that the Welsh branch would be very supportive with arrangements to ensure all goes well, and that delegate numbers are healthy in order to assist with the attraction of sponsors and speakers for the event.

ACES' Award for Excellence 2022 and President's Award

The SVP reported that the documents had been circulated to members with invitations to nominate entries for return in early August. No submissions had been received to date and the Secretary undertook to send a reminder to members.

Asset Management in the Public Sector

Malcolm Williams updated members on the SAM diploma course, which continued to go very well. He advised that the fourth iteration of the course had been successfully completed and ACES team members would undertake a wash up session prior to ongoing discussions with our CIPFA partners. It was envisaged that at least one further iteration of the diploma course will be undertaken commencing early in 2023.

The next Diploma course will be held between 6 September and 6 December 2022. The modules would be updated to reflect recent changes and an electronic version of ACES' Terrier would be made available to course participants. It was envisaged that at least one further iteration of the diploma course will be undertaken commencing early in 2023. Malcolm informed Council that Jon Doherty, Helen Baikie-McLeod and Stuart Knight were now signed up to assist.

Malcolm took the opportunity to thank all ACES members who had been involved in furthering this very successful diploma initiative, but with particular reference to Charles Coats and Joanna Forbes who are stepping down from their presentational



duties. Council recognised the valuable contribution that Charles and Joanne had made.

Discussion took place on the best use of the funds generated from running the courses. Clearly, enhancing the support to ACES members was a primary objective and this could be done by funding research, for example, and by providing further support to branches.

RACES/Homes for Older People

Derek Rowell provided a verbal update report on progress with the RACES and iHOPE initiatives. He noted that it was important to keep these initiatives ticking over as the ageing population ensured that iHOPE in particular remained a critical concern nationally. He noted that former member, Brian Ablett, was keen to get involved with iHOPE, and this was welcomed.

Derek advised Council that he was looking to put together a scope for a research paper, subject to not stepping on the toes of the universities. This might include students getting involved in the research with the help of ACES. Derek requested approval of Council to develop his ideas further into a formal proposition and this was agreed.

Co-ordinators, branches and external working groups

Liaison Officer and Branch reports were received, and these have been published on the ACES website for the information of all members. Once again, thanks went to the Liaison Officers for their efforts in producing detailed and topical reports which are appreciated by members, and to the branches for submitting reports on their activities. The Secretary noted that a tailored

report was not essential from Branch Secretaries if they were constrained by time, and that sending through recent minutes of meetings would be acceptable.

Sam Partridge gave a detailed verbal update of liaison with RICS. Some good dialogue had taken place with RICS recently and a new point of contact established. It was noted that RICS was keen for ACES to be involved in discussions with the government on the levelling up agenda. In this regard it was felt that branches could be more involved here and Sam would draft a note to assist.

The President also reported positive detailed discussions with RICS President Clement Lau. This now needed to be translated into actions and it was agreed that Junior VP, Sara Cameron, would provide a key role here, as she approached the SVP position in ACES.

It was also commented that ACES needed to continue to press RICS to ensure that the views of the public sector were contained in the Richard Review, in view of the significant number of RICS members in the public sector.

Any other business

It was noted that the appointment of the next Junior Vice President of the Association needed to be addressed very soon, ideally with a view to ratifying at the AGM. The President undertook to pursue this.

On the format of the meeting, as the hybrid style seemed to have worked well this time, there was a general view that this option needed to be retained for future meetings. There was no other business raised by members. The President thanked everyone for their attendance and closed the meeting.

Future meetings

It was noted that discussions will be held shortly with the SVP with regard to the location, dates and format of Council meetings for 2023.

Annual Meeting	17 November 2022	Cardiff
ACES Council	January 2023	London?
ACES Council	April 2023	TBA
ACES Council	July 2023	TBA

ACES Terrier is published quarterly by ACES. The inclusion of any individual article in the Terrier should not be taken as any indication that ACES approves of or agrees with the contents of the article.



ACES

The Terrier

ACES Secretary: Trevor Bishop MRICS
07853 262255 - 01257 793009 - secretary@aces.org.uk
ACES Editor: Betty Albon editor@aces.org.uk

ACES MEMBERSHIP

Trevor Bishop MRICS, ACES Secretary secretary@aces.org.uk

I list below the changes in membership between 1 July and 30 September 2022.

New members approved

There were 13 new applications approved during the period:

First Name	Surname	Organisation	Branch Ref
Eloise	Duffy	Ashford Borough Council	SE
Neofitos	Georgiou	Ashford Borough Council	SE
Rebecca	Channings	Bury Council	NW
Neil	Archbutt	East Riding of Yorkshire Council	NE
Sarah	Brant	Freelance	L
Kathryn	Hurlock	HACH Property Ltd	E
Alan	Phelan	NPS Humber Ltd	NE
Julie	Blight	Royal Devon University Healthcare NHS	SW
Suzanne	Rimmer	Sefton Council	NW
Catrin	Mathias	South Gloucestershire Council	SW
Gerard	McParland	South Lanarkshire Council	S
Matthew	Lee	Suffolk County Council	E
Jonathan	White	Valuation Office Agency	NW

Members transferred during the period.

No members transferred during the period.

Resignations

The following 4 members resigned during the period (Resignation includes where members leave an organisation and do not maintain contact with the association):

First Name	Surname	Organisation	Branch Ref
Andrew	Rowson	Andrew Rowson Ltd	E
Andy	Bond	Sefton Council	NW
Steve	Baker	South Derbyshire District Council	HoE
Joanne	Forbes	South Lanarkshire Council	S

Membership

Summary of current membership
at 30 September 2022

Total Membership	
Status	Number
Full	221
Additional	73
Honorary	35
Associate	24
Retired	36
Total	389



Christine is an experienced lawyer specialising in development projects. She works with landowners, developers and development managers on the acquisition, promotion and building out of sites for new homes and mixed use schemes. Christine is an advocate of green spaces for people and nature and has a particular expertise in establishing and implementing estate management strategies for the long-term stewardship of community facilities and open spaces in new developments.

ENVIRONMENT ACT 2021

Biodiversity net gain and nutrient neutrality considerations

Christine de Ferrars Green Christine.deFerrarsGreen@Mills-Reeve.com

Christine outlines the forthcoming implications of implementing the provisions of the Environment Act 2021 for development sites.

The Environment Act 2021 and planning conditions

We are starting to see more activity in the marketplace as landowners and land managers make ready for the preparation and delivery of off-site biodiversity gain sites, through agreements with developers, the offering of off-set units and investment in creating habitat enhancements.

Developing with nature has been a theme for many housebuilders and master developers for some years. Now, there's an increasing focus on the need to safeguard our environment, prevent habitat loss, and create great green spaces in which new homes are built, for residents to enjoy alongside the animals and plants that naturally make their homes there as well.

As from November 2023, the provisions of the Environment Act 2021 are likely to introduce the requirement of 10% biodiversity net gain for almost all development sites, with only a few exceptions. The new, mandatory provisions will be building on national and local planning policies that have been in place for a while. So, in some senses, this isn't new, but there is a change in emphasis.

New planning permissions for relevant developments will have general pre-commencement conditions that require the approval of a biodiversity gain plan for a development site. Such a plan will set out the developer's required commitments to deliver enhanced biodiversity value

on-site, and/or the allocation (to that development) of registered off-site gain (or else the purchase of government credits) for habitat enhancement; the amount required will be calculated using a standardised biodiversity metric. The plan will be approved as a condition discharge, but ongoing maintenance of the works delivering the gain on-site will need to be enshrined in a planning condition, s106 planning obligation, or a conservation covenant.

On-site and off-site options

Where biodiversity net gain cannot be delivered completely, or at all on-site, then the required percentage uplift (that which is considered not achievable on site) will be measured in terms of units which can be purchased, ensuring delivery off-site. Off-site mitigation will then be provided on registered biodiversity gain sites, for which allocations will have to be agreed and confirmed before development starts on-site.

As mentioned, we are starting to see more activity in the marketplace as landowners and land managers prepare for the registration of biodiversity gain sites. This includes landowners undertaking evaluations of land which may be suitable for habitat enhancement. Some landowners have already committed to green space and nature management, acquiring land for this future purpose, and the creation of habitat banks in which off-set biodiversity units may be sold to developers.

A strong argument can be made for off-site provision, at scale and by landowners and managers committed to, and with experience of this, as a purpose and objective of their organisation. The case is made that larger sites can be managed more effectively and potentially offer greater opportunities for biodiversity than smaller, fragmented provision on-site. Allowing for delivery of gain off-site through the purchase of units (or government credits) is a pragmatic “win-win” solution, in keeping with the modern idea of “off-setting”. This approach looks likely to be followed as an option in the current nutrient neutrality debate.

We are observing a potential debate around “less significant onsite enhancements” – which might be roadside verges, landscaping swales or features of sustainable drainage schemes, but could also be gardens associated with private dwellings. The issue here is the question of in perpetuity (at least 30 years’) management, and the enforcement of obligations to deliver such management to the agreed plan. Local planning authorities and other enforcement agencies are going to be reluctant to be enforcing against householders, and so we consider it likely that domestic gardens in new developments will contribute little, if at all, to the quantum of on-site habitat enhancement in the biodiversity net gain plan for a site. We are waiting for the outcome of DEFRA’s recent consultation to judge how this will be resolved.

Who and how these gain sites will be funded is something else that we are seeing develop. There will be a trade in biodiversity units, bought and sold as between landowners and developers. Some housebuilders and master developers on large sites will be able to deliver their habitat enhancements on-site and are likely to commit some capital development budget to delivery, and recoup costs and ongoing maintenance through management and residents’ service charges. There are likely to be endowments of capital funds and commuted sum payments to land managers, local authorities, town or parish councils, habitat bank providers and charitable and social enterprises, such as the national network of Wildlife Trusts and the Land Trust. There may also be some grant funding arrangements, as well.

Biodiversity net gain is nothing new, but it will be taking on a new and exciting direction in the coming years. Many developers have embraced developing with nature in pursuit of doing the right

thing, meeting the compelling demands of their boards and their shareholders, and seeing the value of great placemaking and place-keeping in sustaining new homes sales prices. Looking to the future, the emphasis will be increasingly on meeting needs and addressing our nature recovery plans, with a mindset shifting from residents’ amenity to land management for the principal benefit of stewardship of our precious environment.

The ‘nutrient neutrality’ issue

In recent years, nutrient pollution (particularly from nitrogen and phosphorous) has become a significant problem affecting a range of river and other freshwater habitats and estuaries. The concern is that increased nutrient levels in excess of safe thresholds that come from new developments find their ways into local watercourses and have a profound impact on the water quality in a wider catchment area.

Special concerns around water quality are focussed on a range of statutory protected designated ecological sites. To comply with Habitat Regulations, local planning authorities in 74 affected areas of England (as identified by Natural England) are required to consider the impact of any proposed development when granting planning permissions. As part of the consenting process, developers must prove that they can achieve nutrient neutrality for their proposals. Where there are already high levels of nutrients, in most instances, mitigation measures will be required.

The requirement for assessing nutrient neutrality (or the absence of it) and agreeing appropriate mitigation is adding significant cost and delay to the development consenting process, bringing some planning application decisions to a halt completely in the affected catchments. To date, there has been a high mitigation requirement to achieve the necessary offsetting of nutrient pollution related to development, as well as insufficient availability of accessible mitigation measures. It has been estimated that some 100,000 new homes have been put on hold as a consequence.

Nutrient mitigation Scheme

The government has recently announced a new measure - the Nutrient Mitigation Scheme. This will be established by Natural England and is set to launch in Autumn 2022, when details of the Scheme will be published, albeit there isn’t yet clarity as to

when it will be up and running.

The fundamental aim of the Scheme is to provide the house building sector with an immediate solution to ‘unlock’ stalled development proposals, by making access to mitigation easier in the short-term and, over time, to reduce the amount of mitigation needed.

The Scheme will create new wetland and woodlands in partnership with green groups and other privately led nutrient mitigation schemes. It is hoped that these new or expanded wildlife habitat sites will also be open spaces and places which will give increased access to nature for people to enjoy, while providing for nature restoration.

It is anticipated that DEFRA and DLUHC will provide funding to ‘pump prime’ the Scheme, and Natural England will work in conjunction with stakeholders to identify mitigation projects in nutrient neutrality catchments.

The Scheme will enable developers to purchase ‘nutrient credits’ which will discharge the requirements to provide on-site mitigation. Natural England will accredit locally based mitigation sites to be delivered through the Scheme, which will then enable local planning authorities to grant planning permissions for developments which have secured the necessary nutrient credits in their catchment.

The launching of the Scheme will build on arrangements that are already being made in affected areas, with landowners setting aside land to be managed more effectively for nature to provide off-set sites. There are media reports, for instance, that the local Wildlife Trust in the Hampshire and Solent region, which was one of the first to be affected by the Natural England moratorium, has bought mitigation sites and is selling credits to house builders.

These proposals have been announced, together with a new measure to impose a legal duty on water companies to reduce nutrient pollution by 2030 through the upgrading of wastewater treatment facilities to the “highest achievable technological levels”.

‘Biodiversity Net Gain’ and ‘Nutrient Neutrality’ originally appeared as blogs on the Mills & Reeve Real Estate law blogs (<https://www.mills-reeve.com/insights/blogs>). Thanks to Christine for allowing me to reproduce them in ACES Terrier.

If you are interested in finding out more or need advice for a project, please get in touch with the planning and development team, Christine de Ferrars Green or Caroline Bywater.

Stop press

Recent hydrological connectivity and water quality modelling work carried out by Dover District Council and reviewed by Natural England, relating to a protected wetland site in Kent, has meant that Natural England has effectively lifted the moratorium against the grant of planning permissions in that area. The work evidenced a very low connectivity between outputs from a particular wastewater treatment

plant and the protected site, and therefore concluded that development resulting in new connections to that plant would not have a significant impact on the protected site. As such, no Appropriate Assessment is required for otherwise affected applications. A formal update on Natural England's advice in relation to the Stodmarsh catchment area is expected, but we may see that the steps taken here could be used as a model for other affected areas.

Elsewhere, the Prime Minister, Liz Truss, has been widely reporting as saying that she wants to scrap rules surrounding nutrient neutrality (which derive from EU legislation), in order to reduce the red tape preventing developers securing planning consent. We hope to hear more about that in the coming months, but it is unlikely to be a quick process.



David is a land agent, consultant, and member of the Natural Capital team at Carter Jonas, joining in 2022 to expand the services that the team can deliver to its clients. Prior to this, David was Head of the Property Services function at Northumbrian Water for over 25 years. As part of that role, he helped develop the organisation's thinking around corporate natural capital accounting and biodiversity net gain, including how this link into their corporate property strategy and wider business goals. David was also involved in major projects such as the Abberton Reservoir expansion scheme, increasing its water level by 3.2 metres, so creating an additional 15 million litres of freshwater storage. The scheme required careful environmental consideration being within a SSSI, Special Protection Area, and Ramsar Site. He was a Trustee of Suffolk Wildlife Trust from 2015 to 2021.

BIODIVERSITY NET GAIN Some conundrums...

David Alborough MRICS MRAC David.alborough@carterjonas.co.uk

David and Neil of Carter Jonas jointly made a presentation at the National Conference. a summary of their presentation is included in the conference write up in this issue of ACES' Terrier. David kindly agreed to prepare this article which identifies – and solves? – some of the conundrums of delivering BNG.

As some local planning authorities begin to put biodiversity net gain (BNG) policies in place, and deals begin to be done, the BNG market is finally starting to develop. What we're faced with now remains far from straightforward – but what are the key questions that we're still trying to answer?

How will onsite BNG be managed?

The draft regulations do have a strong steer towards delivering BNG on site. However, if you think this through, there are a few things to consider if you are a local planning authority (LPA). Who is going to manage these for the next 30 years and beyond? The developers will be keen to transfer this on to the management company, as they do with landscaping. Thus, over time there will be lots of small areas of BNG managed by householders who may or may not understand what they must do or have the skills to do it. As time rolls on they may not even realise that they have this liability.

It is easy to imagine a situation where say some low fertility grassland was created when the development was built, and a management company was set up. We are now 5 years on, some of the owners have

parked cars on the area and children are now using it as a football pitch.

Someone wants to sell, and their purchaser's solicitor points out they are in breach of a planning condition, as the BNG site may no longer be delivering the units required. Their client can't get a mortgage unless remedial work is carried out. The poor householder then has to persuade all his neighbours to cough up so they can move house. You only have to look at the state of most private roads to see how it will go.

Questions will be asked of the LPA who approved the biodiversity plan for the development.

We think LPAs and developers need to consider offsite BNG where the management can be better secured. However off site has its own problems as I will now come onto.

Habitat banking: how will the units be secured?

Within the draft regulations, the BNG for a development is secured as a local land charge over the specific area of land that is supplying the credits. Now that sounds simple enough... Now imagine you have a 100-acre habitat bank, and you create 100 BNG credits and sell them to offset the



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impacts of 100 developments with 100 different developers.

As it stands, there will be 100 separate local land charges – one for each development – all needing to be individually monitored, probably at different times. That is bad enough, but what happens if nature does its thing and parts of the site grow well and others don't? You could easily have a situation where the site as a whole is delivering 110 BNG units but they are only located on 70% of the plots. Would it really make sense to:

- a. do all that monitoring, and
- b. enforce against the 30% that are not delivering, when the site as a whole is over-delivering?

We think a single land charge over the whole area of the habitat bank is the answer. That way, so long as all the units delivered over the whole area is sufficient to meet the commitments, there isn't a problem. A monitoring plan can be agreed that covers the whole site for any development secured by it. Thus, its only one monitoring visit not 100. It's going to need habitat bank providers and LPAs to work together to get it to work sensibly.

Who is going to pay for the monitoring?

According to the draft regulations, it will be the developers' or landowners' (where they are delivering the BNG) responsibility to pay for this. That all seems fine for a habitat bank; the owner of the bank will need to make sure there is enough money built into the price to do so. What happens in the scenario above where the BNG is delivered on site and managed by a management company? Presumably it will be built into the management charge, but will these management companies have the skills necessary to find the right contractors to do this? Is there an opportunity for LPAs to fund their own ecologists by offering to do this work? Would it create a conflict of interest or help solve the problem of these potentially poorly managed sites?

It could make sense to link up the maintenance of these areas with the maintenance of public realm and for the local authority to pick up the monitoring as well. The developer could pay an up-front charge to cover all of this, and the LPA could invest this money to deliver the service and possibly more over time – especially if, as part

of the deal, the potential for the income from carbon credits is included.

Are natural capital strategies compatible with development strategies?

Many of our clients are starting to think about the new asset class of natural capital. I say 'new' but actually, as we all know, it's always been there – just not as visible as it is now. One thing that has struck me is that this is a potential problem for organisations like local authorities that own land and sell it from time to time for development. I have seen biodiversity/environmental strategies that include an aspiration to grow the natural capital of an organisation over time. The same organisations have development strategies and targets. In my mind, if you are selling a block of land, you will more than likely be reducing the natural capital of your organisation.

The two do seem to be mutually incompatible but, if you think strategically, it can work. Either create your own BNG to offset the development, or steer the developer to create BNG that they hand over to you. You can not only offset the loss but create a gain, especially if you can link it into the development of public realm.

How do you assess the market value for a BNG unit?

Efttec and others, as part of their BNG market analysis report, came up with an average value of £20,000 per BNG unit. This figure has been widely quoted, but things have moved on considerably since February 2021 when the report was written. At that time, the price was made up from the costs of delivery and ongoing management for different habitat types.

This is not what makes up the price of something in other markets. Other factors come in, such as opportunity cost, scarcity, and quality, as well as branding. Perhaps credits provided by an organisation whose brand values work to support a higher sale value for homes in the development may well have a premium price.

A number of LPAs will have an excess of demand and developers will need to look over a yet to be defined border. What if the neighbouring LPA has an excess of demand too? The biodiversity metric has a spatial multiplier, which reduces the value of a unit the further away it is from the development it relates to. It may make sense to work

together either at a county or wider scale to make sure this doesn't put a blight on development.

We will see, when the regulations come out in the Autumn, whether the government has also been pondering these questions.



BIODIVERSITY OFFSETTING Solutions, opportunities

Hannah Buckenham h.buckenham@whirledgeandnott.co.uk

Hannah made a virtual presentation to ACES Eastern branch in July and kindly agreed to write this follow up article about the practicalities of biodiversity offsetting and opportunities for landowners. All photos are reproduced with permission from iStock.

Hannah is Head of Environment, and joined Whirledge and Nott in February 2021 to head up and grow the department for biodiversity offsetting solutions and environmental schemes. Hannah works with developers and ecologists across the country to understand environmental and offsetting requirements as part of the planning process and the opportunities these present for landowners to deliver these long-term schemes. With a background in Management Consultancy covering change and transformation, process improvements across the public and private sector, this experience combined with having an active involvement in her family's arable farm, Hannah has been the perfect fit for tackling this new and growing area of environmental opportunities for landowners.

Governments and policies change, but Biodiversity Offsetting may well be here to stay. Developers are beginning to see it as a value add as part of their planning applications; local authorities and communities want to see green gains in their district; and landowners are considering the commercial opportunities for the better management of some of their previously less productive or unloved land.

The Environment Bill

Under the Environment Act 2021, all planning permissions granted in England (with a few exemptions) will have to deliver at least 10% biodiversity net gain (BNG) from November 2023. BNG will be measured using Defra's biodiversity metric and habitats will need to be secured for at least 30 years. By definition, Biodiversity Offsetting is a

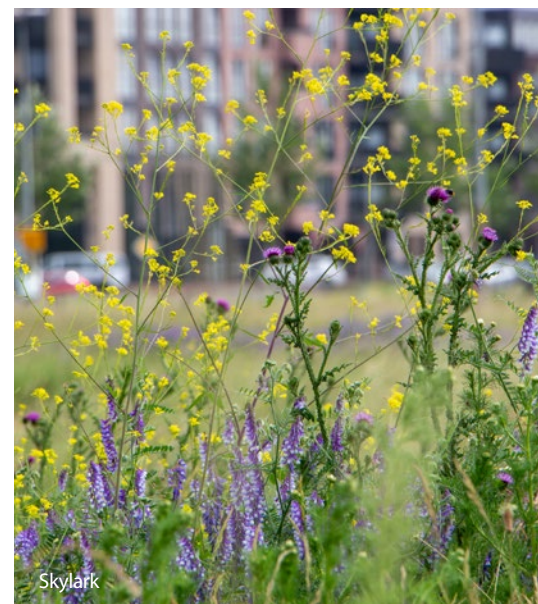
policy approach that seeks to minimise environmental impacts of development by ensuring habitat damage is compensated elsewhere. It should be designed to result in an overall biodiversity gain.

To date we have found that the demand for Biodiversity Offsetting doesn't actively promote the replacement of productive grade 1 arable land – whether market prices in time drive this will remain to be seen - but anyone managing land for the long term would rightly have reservations about signing up the most workable and productive areas of their land to such permanent changes and commitments.

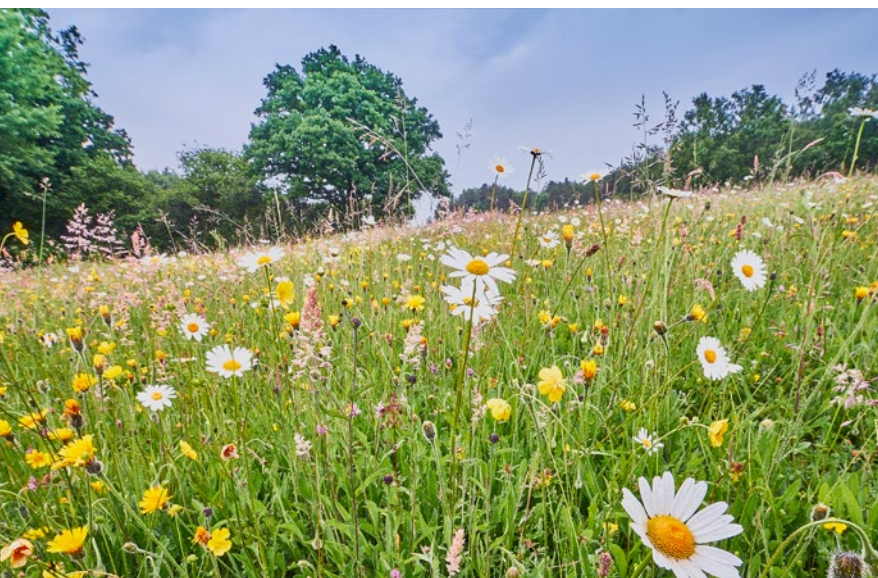
There is currently a lot of commentary around whether there is a threat of deregulation and steps backwards in the environmental stewardship areas. However, there are reasons why BNG, environmental mitigation and



Responsible planning and management



Skylark



enhancement schemes are proving popular in the planning application process and why there will likely remain local pressures for them to stay. Benefits of these schemes include that they:

- Add environmental credibility to development
- Deliver meaningful environmental gain within the local district
- Satisfy the appropriate planning authorities
- Provide long term monitoring and management of environmental sites peripheral to developments.

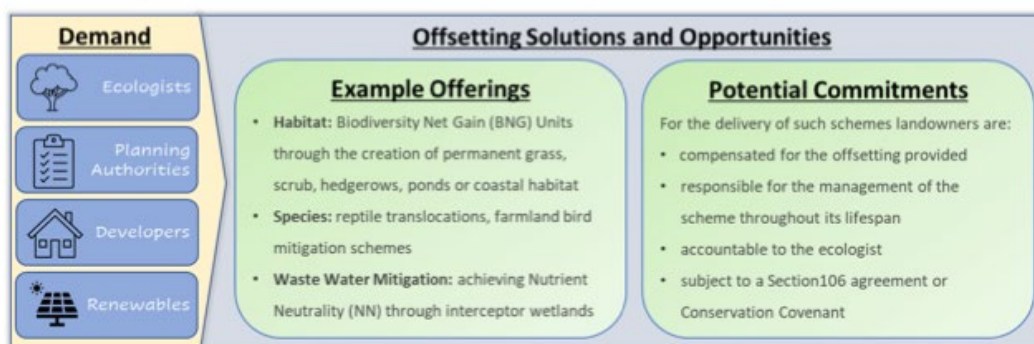
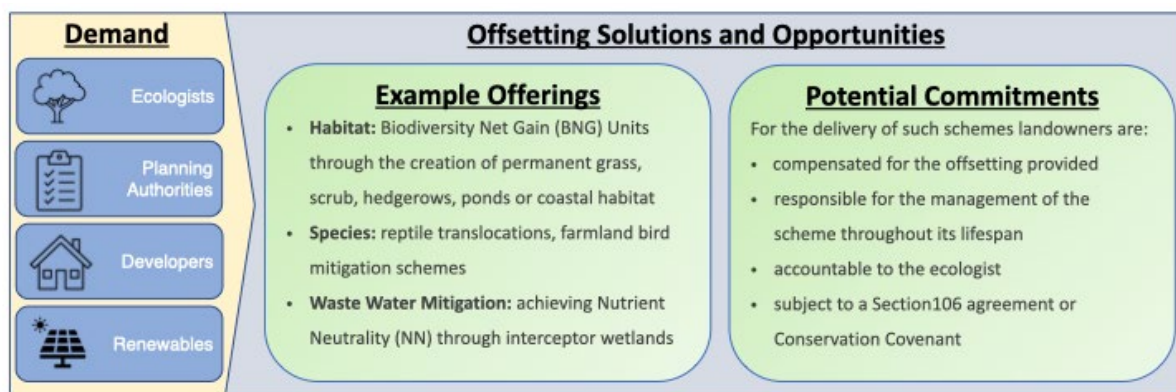
On the ground

Whirledge & Nott has already been working with parties to deliver a wide range of environmental and BNG solutions. Although BNG is the current hot topic, a variety of other mitigation and offsetting schemes are regularly required as part of the planning process. The diagram shows the typical requests Whirledge & Nott receives in the offsetting and mitigation area and what a landowner would be looking to commit to.

Farmland bird mitigation schemes such as Skylark Plots can be created in winter cereal crops on a rotational basis for a 10-year period, as part of the management agreement entered.

Poor quality grazing or arable land can be used for the creation of permanent enhanced grass or scrubland. In some instances, we've seen approximately 4 BNG units delivered from 1ha through this approach. Depending on the habitat being lost, the additional creation of ponds or reedbeds may also be beneficial.

In sensitive catchment areas such as Norfolk and Hampshire, developments often need to achieve Nutrient Neutrality. These schemes can require large areas of land within the catchment areas to deliver mitigation measures such as interceptor wetlands or the changing land use from arable to something more permanent.



Existing grass and scrubland more often than not has capacity to take additional reptiles such as slow worms, lizards and grass snakes, providing the perfect site for Reptile Translocations. Through the creation of hibernacula and an appropriate mowing schedule these can be easily managed.

Our favourite example to date has been the provision of temporary board and lodging for water voles while infrastructure works are undertaken. Interestingly they need little if any water and live very comfortably on an apple and a carrot a day.

Relocation of invertebrates or creation of habitat for the same is required occasionally on unusual and specially created terrain such as Lytag or other industrial by products.

You can't count your chickens twice...or can you?

The world of environmental schemes and funding brings with it such words as stacking (ok) and double counting (not ok). For example, you cannot take payment from the

private sector for 10 skylark plots and then receive payment for those same 10 skylark plots for government stewardship schemes; however you can create an additional 6 plots as part of government schemes if you have sufficient land to do so.

You could, however, create permanent grass and scrubland benefitting from BNG payments, then once the habitat is sufficiently established, use this area as a reptile translocation site, if reptile surveys show the area can support additional reptile populations. Thus, it achieves additional financial income over and above the BNG payments.

Keeping it local

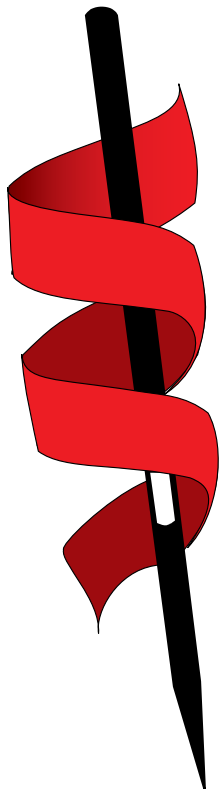
There was an article in 2022 Summer Terrier which covered BNG adoption in local plans. Some districts are pushing for 20% net gain, and depending on the strategic nature of some development sites, the developers are volunteering 10% or more on a voluntary basis.

Individuals and organisations should keep an eye on the Local Nature Recovery Strategies and the work of their county's Local Nature Partnership to see where the local priorities for habitat locations and type are, and how they can contribute to this.

The land portfolio managers' To Do list...

Now is the time that land managers should be reviewing their land, parcel by parcel, to determine the long-term viability of each, given its current use. Through working to determine what their objectives are in the longer term and whether that be for development, renewable energy, food production or recreation, and consequently identifying if they have parcels which they might be ready to either dabble with or commit to the BNG market.

This is an evolving area and landowners need to consider seriously what role their land may play both financially and environmentally.



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*The cost per advert for non-members is currently £100.00 for a maximum of 4 weeks' exposure on the ACES website; this is still excellent value!!

Contact the ACES Secretary, Trevor Bishop MRICS, at secretary@aces.org.uk for further information.



SUSTAINABLE COMMUNITIES

How to create a sustainable community

Ronan Leyden ronan.leyden@bioregional.com

Ronan is Director of Consultancy at Bioregional, the award-winning social enterprise and sustainability consultancy. Bioregional works with partners across the built environment, supporting asset owners such as housing associations and real estate funds to revitalise legacy and heritage buildings; partnering with business improvement districts to create sustainable high streets and leisure destinations; and with local authorities to create local planning policies that support the UK's transition to net zero.

Ronan presented at the National Conference and agreed to write this article. His arguments are that through triple bottom line accounting, local authorities can leverage land and assets to create sustainable communities that respond to climate and ecological emergency. He urges: "Act with urgency! It's called an emergency for a reason, and what we do this decade will determine our future."

Around 80% of local authorities in England and Wales have declared a climate emergency, but can face significant barriers as they try to implement the urgent action that is needed to reduce the negative impacts of climate change and deliver net zero carbon by 2050.

More than a decade of cuts to council budgets have reduced the resources available to planning authorities, and put additional pressure on councils to achieve 'best value' when disposing of local assets. And national building regulations do not yet address the whole-life carbon emissions associated with new development, leaving ambitious sustainability-driven developers locked out of the market by high land values.

These barriers must be overcome quickly. While 2050 may seem far away, the decarbonisation trajectory we need, according to the latest climate science, requires we roughly halve direct emissions by 2030, in just 8 years' time.

However, there are significant opportunities for estates professionals. By working imaginatively with partners and looking beyond short-term financial considerations, to take a holistic view of the impact of new development – 'triple bottom line accounting' – local authorities can leverage their land and assets to create thriving, resilient, and sustainable communities, which bring with them wider financial benefits such as reduced spending on health, welfare, and environment.

But what do we mean by a sustainable community, and how can local authorities work with their partners and stakeholders to deliver them?

Definition of a sustainable community

• Current practices

• Key themes

- 1) **environmental**: climate and ecological emergency
- 2) **social**: social value and community benefit
- 3) **economic**: regeneration and opportunity

Driving legislation

Climate Change Act 2008 /
Environment Act 2021
Social Value Act 2012
Levelling Up and Regeneration Bill 2022



What is a sustainable community?

The traditional view of sustainability envisages three 'pillars' – environmental, social, and economic. This gives the false impression that each of these pillars are of equal importance.

A different model – of nested circles – gives a truer understanding of the relationship between these elements (see

corner of image of Definitions). Of course, our economic system is necessarily situated within, and dependent on, our society for its existence – economics is a social construct that does not exist without people. Likewise, society is necessarily situated within and dependent on the natural goods and services that are provided by the environment, and are essential for our survival.

This means that true sustainability will have environmental considerations at its heart. It follows that creating sustainable communities will generate tangible benefits – from the regeneration of natural ecosystems, to the improved health and happiness of communities – that are not captured by the traditional and narrow assessments of short-term financial returns.

How is government policy supporting this agenda?

Government policy is moving slowly towards providing the necessary framework to encourage sustainable development. At a high level, the Climate Change Act 2008, as amended in 2019, places a legal duty on the government to achieve net zero carbon emissions by 2050.

The Environment Act 2021 contains several environmental protections and targets, most notably the requirement for new development to achieve 10% net gain in biodiversity.

The Social Value Act 2012 places a requirement on all public sector organisations to consider societal, environmental, and economic wellbeing in determining contracts, although there is complexity in how this applies to asset and land deals.

And the local economic agenda is, at present, being delivered through the levelling up white paper and Levelling Up and Regeneration Bill 2022. While not yet law, this contains proposals to ease the compulsory purchase order process and simplify the funding of local infrastructure through developer contributions.

These policies are necessary but insufficient.

One Planet Living® – a framework for creating sustainable communities

To live sustainably means living within our planetary boundaries. Our planetary impact arises from housing and transport, the food we eat, the goods we consume, and the

services we use. If everyone in the world lived like we do in the UK, we would need almost three planets to support our lifestyles.

In response to this challenge, Bioregional created the One Planet Living framework in 2003. One Planet Living is a holistic framework consisting of 10 simple principles that cover the full range of social, economic, and environmental factors that need to go in to make a sustainable community.

Underpinning these principles are sector-specific goals and guidance, and a manual for how to implement them. One Planet Living has been used by communities, cities, and developers around the world. It has informed the creation of \$30bn of real estate projects globally to date, with 1.3m people living or working in One Planet Living projects.

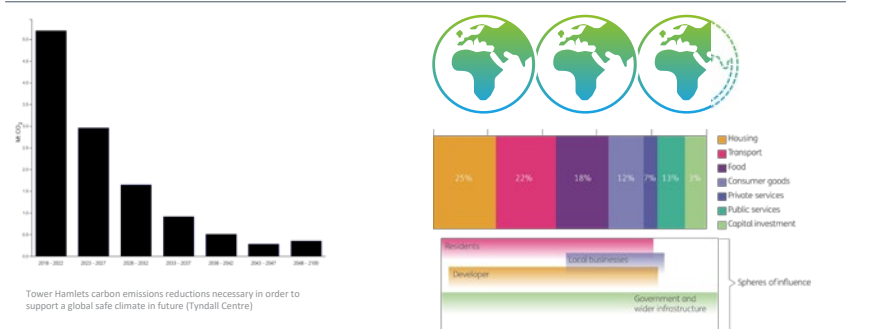
These principles provide a vantage point from which to envisage how new development can be genuinely sustainable.

Applying One Planet Living in the built environment

Core to implementing One Planet Living is to establish the needs of a community against each of the One Planet Living principles, using all available data and existing research. Establishing a vision for a local area should be done in partnership with the community, to ensure that everyone's perspectives are considered and that the goals are grounded in the lived experience of people's day-to-day lives. This process will generate an action plan setting out outcomes, actions to achieve them, and indicators against which progress will be measured. Reporting publicly on your goals and actions creates transparency and accountability. And regularly reviewing your progress enables you to refresh your vision (stage 2) if necessary, and your action plan (stage 3). These should be considered 'live' documents and be constantly updated.

One Planet Living®

• Sustainable communities definition & framework



One Planet Living principle	Application in built environment
Health and happiness	Design climate-resilient homes and communities that enable and promote healthy habits.
Equity and local economy	Be fair – support local businesses and affordable housing.
Culture and community	Boost community by creating shared spaces and develop a culture of sustainable living.
Land and nature	Create a connection with nature, and enable it to thrive.
Sustainable water	Use water-efficient appliances and increase resilience to flood.
Local and sustainable food	Promote plant-based choices and provide space to grow food.
Travel and transport	Reduce the need to travel and make active travel the easiest option.
Materials and products	Reduce embodied carbon and source responsibly.
Zero waste	Think circular throughout design, construction, and operation.
Zero carbon energy	Design for net-zero carbon then make sure you achieve it.

Stage	Output	How
1.Needs analysis	Evidence base	Desk-based research
2.Visioning	Goals and ambition	Interactive workshops
3.Action plan	Outcomes, actions, indicators	Collaborative planning
4.Publicly report	Transparency and accountability	Communications, presentation
5.Review	Learn and adapt	Objective analysis

Using land and assets to enable One Planet Living

Following this method, local authorities have been able to enable new sustainable development by combining a holistic approach to sustainability with a 'triple bottom line' perspective that considers the environmental and society benefits of new development, rather than prioritising short term financial returns.

Case studies

BedZED

The multi-award-winning BedZED development was the UK's first large scale sustainable community when it was developed 20 years ago through

a collaboration with Peabody Trust, Bill Dunster Architects, Arup, and Bioregional. Despite some teething trouble due to its experimental design, BedZED remains an internationally recognised flagship for sustainable development. The mixed community includes 100 homes, 50% of which are affordable, a specialist college and employment space, community facilities, including an open playing field, green gym, meadows, and allotments.

BedZED residents enjoy a strong sense of community and benefit from low utility bills, using 27% less electricity and 36% gas than comparable households. BedZED homes sell at higher prices, and more quickly, than those in nearby streets.

The development was unlocked by London Borough of Sutton, which agreed to dispose of the land at a below-market rate by factoring the 'abatement cost' of the carbon emissions that it would save into the sales price.

Sutton Farm

Sutton Farm, established by Bioregional in 2010, but now independently owned and operated, represents another example of public assets being utilised for wider community benefit, transforming underutilised Surrey County Council-owned land into London's most productive farm.

Sutton Farm was created after community consultation in the local area established a need for access to fresh fruit and vegetables, to improve health and reduce the carbon emissions associated with the transport of food.

Saxon Court

Bioregional is supporting mixed-use developer Socius on detailed designs for the redevelopment of Saxon Court, Milton Keynes' first office block, following the granting of planning permission last year. As well as providing refurbished and extended office space, Saxon Court will include 288 new apartments for rent, and a public square for community events.

The site was released by Milton Keynes Development Partnership in a competitive OJEU tender process, granting Socius a 999-year investment lease, following a successful local campaign for the offices to be retained and redeveloped.

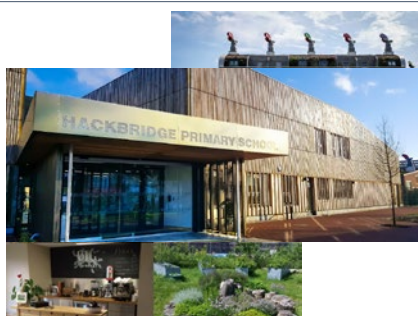
This was made possible by calculating the broader sustainability benefits of the scheme, which will generate £300m of social value over the next 20 years. The development will be fossil fuel free, deliver a 25% net gain in biodiversity onsite, and will offer residents the use of a car sharing club rather than private parking spaces.

BedZED

• Mixed-use eco-development in Sutton, London

- 100 homes, 50% affordable
- Specialist college and employment space
- Community pavilion, café
- Playing field, green gym, meadow and allotments
- Near zero-carbon energy, on-site car club, low utility bills
- Strong community culture and social interaction
- Improved values and sales velocity vs nearby comparators

LB Sutton council-owned land disposed of at below market rate with Abatement Cost of Carbon factored into the sales price – proposed by LB Sutton and approved by Secretary of State.



Sutton Community Farm

• London's most productive farm in LB Sutton

- Founding aims:
 1. local people to learn more about growing food
 2. foster community and promote health
 3. increase the supply of locally produced food
- Current performance:
 - >£800,000 turnover
 - 500 veg box grown, sold and delivered per week
 - > 15 tonnes for fresh organic veg produced a year
 - c.10% of veg boxes donated to food charity – 150 people/week
 - 80 volunteers per week on site (10,000 hours per year)
 - 11 jobs created, 4 traineeships
 - Community Benefit Society +400 community owners

Underutilised Surrey County Council-owned land now leased and productive



Implementing a triple bottom line approach

Quantifying the social, economic, and environmental benefits of new development is not yet an exact science, but is allowed in the UK Government's Green Book setting out how such projects should be appraised. Whole life economics is difficult for practitioners to apply in a financial crisis, and there is the added

Saxon Court (MK Gateway)

SOCIUS

• Milton Keynes' tallest re-development scheme

History:

- MKs first office building, generous atrium and contribution to city-scape.

Proposed scheme:

- Offices - refurbished and extended
- new indoor and outdoor public squares for F&B, leisure, retail and community events
- new accessible workshop and maker space
- 288 new apartments for rent with vertical communal

Sustainability credentials:

- Social Value - £300 million over 20 years
- Zero fossil fuel - communal ASHP for heat and PV for power .
- 25% net gain in Biodiversity on-site
- Car share and car club on-site, no new parking provided



Local campaign championed the retention of the offices – released by Milton Keynes Development Partnership in a competitive OJEU tender process - 999 year investment lease.

Bioregional

political challenge to get buy-in to social value, but there are some key principles that estates professionals can follow:

1. Think holistically. Examine a broad range of principles – societal, ecological, and economic – to understand how they interconnect, and how technological and demographic trends will influence people's needs in years to come
2. Challenge short term financial mindsets. Overcome short termism by creating a local needs analysis that is evidence-based to justify decisions and non-financial options. When influencing others, learn to speak their language - be a chameleon! And remember that genuine personal conviction and passion can open doors.
3. Collaborate in partnership. Find local champions and work with a range of partners. This will generate opportunities to leverage greater impact.
4. Maintain an open mind. Being an agent of positive change is hard work, and it is easy to be a blocker by mistake, especially from a position of power
5. Act with urgency! It's called an emergency for a reason, and what we do this decade will determine our future. The public desire and demand for sustainable credentials and activities is very high. However, awareness needs to cut through complexity of the issues to differentiate "Greenwash" from real projects. We now need to focus on how we can create the business case for truly sustainable development that is fully integrated into our communities.

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Sally joined the Town and Country Planning Association in April 2022 to work as a Projects Assistant. She supports the delivery of the TPCA's Healthy Homes campaign and work on climate change. She holds a Master's degree in Environment and Sustainable Development from University College London, and preceding that, she studied geography, sustainability and geology at Hofstra University in New York. As a part of her studies, Sally completed an internship at Nature Connect in Cape Town that focused on conservation and environmental education.

HEALTHY HOMES CAMPAIGN

The impact of permitted development rights, on the quality of the nation's new homes

Sally Roscoe Sally.Roscoe@tcpa.org.uk

Sally kindly agreed to write this article, following a TPCA webinar about the deterioration in quality of dwellings created under permitted development rights. TPCA has developed a tangible solution to this widespread problem that simplifies and strengthens the regulation of the built environment and ends the creation of unhealthy homes, by introducing legally binding 'healthy homes principles'.

Office to residential conversions through 'permitted development rights' (PDR) symbolise how broken the regulatory system for the built environment is. It is a system that results in too many homes which undermine resident health and wellbeing. At the Town and Country Planning Association (TCPA) we are working to change this through our Healthy Homes campaign.

Problems with PDR

The last few years have seen waves of media outcry about the delivery of homes through PDR, coinciding with their gradual expansion since 2013. In 2020, the then president of the Royal Institute of British Architects (RIBA), Alan Jones, called the extension of PDR 'truly disgraceful.' (1) RIBA is not alone in this sentiment, with many other experts in the field – including the TCPA – branding PDR homes as the 'slums of the future.'

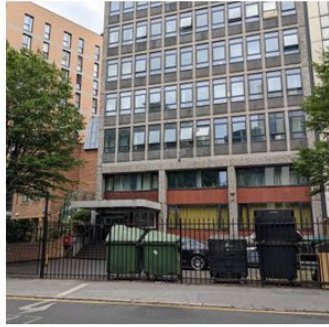
PDR illustrates what happens when housing quality is deregulated. Evidence suggest that a significant proportion of PDR homes are extremely small and overcrowded, poorly located (such as in office parks and industrial estates), lack natural light, do not have any access to green space, and are otherwise unsafe. In 2020, research found that of the 639 office to residential conversions that were examined across the nation:

- only 22.1% met nationally described space standards
- 72% had only a single aspect window (10 had no windows at all)
- and only 3.5% had access to private amenity space (2).

Not only are these homes poor quality, but they are also leaving lasting impacts on the financial accessibility of the nation's housing stock as there are no regulations on their affordability. According to the Local Government Association, approximately 18,000 affordable homes have been lost to PDR since 2015, as councils' typical requirement for 25% of new developments to be affordable cannot be applied to PDR conversions (3).

Despite all of this, in 2021 the government decided to expand PDR to include warehouses, shops and many other town centre buildings (4). Official figures state that 73,575 offices have been converted to homes since 2015, but it is possible that this number may be even larger than reported (3).

It is true that the Department of Levelling Up, Housing and Communities has made some important concessions in these areas to improve regulations on space standards and natural light (5). But while this progress is important and worth celebrating, it is still not enough to prevent the construction of PDR homes



Office to residential PDR conversions in Croydon. Photos by Dr Daniel Slade (Policy and Projects Manager at the TCPA).

that undermine their residents' health and wellbeing. A system that fails to deliver homes with access to natural light and liveable space - until these features are explicitly required - is a broken one.

On-site visits to PDR homes in Croydon

All the facts and figures in the world do not prepare you for seeing them in person. As a part of the TCPA's research on homes created using PDR, my colleagues and I have been conducting site visits to areas in London that have been hit the hardest by poor quality office to residential PDR conversions. On a recent trip to Croydon, we were particularly shocked by the PDR homes.

The first site that we visited immediately felt more like a busy bus station or a decaying office block than a residential building with hundreds of residents. Residential outdoor space was lacking, and the atmosphere was unwelcoming. This was an overall trend on the trip, particularly as all the sites that we visited had little to no outdoor space. Many of these conversions had tinted windows and some had basement flats with very little access to natural light. Some even had broken doors and overfilled rubbish bins near the building's entrance.

This situation is only getting worse. More homes are being created through PDR conversions in many of these areas. From

each of the sites that we visited, we found examples that we did not even realise were there. Entire neighbourhoods across London are now being transformed by these poor quality PDR conversions.

Why does this matter?

The overall condition of many of these PDR conversions truly does signify that the current regulatory system for the built environment is broken. When profit and meeting demand is focused on above all else, quality often falls back on the list of priorities. The provision of new homes should focus on actively improving the health and wellbeing of future residents. In the words of Lord Nigel Crisp, a previous Chief Executive of the NHS, health is made at home, hospitals are for repairs (6).

For residents of poor quality homes, there are very real consequences for their mental and physical health. For example, many studies confirm that green space is an essential component in achieving a good quality of life by relieving stress levels and promoting mental wellbeing (7). Despite this, many PDR homes have very limited, if any, access to green space.

Access to natural light is another area that PDR homes are often lacking. There is strong evidence that physical, mental and sleep health are all positively impacted by natural light (8). Yet, when looking at previously mentioned statistics, 72% of the 639 PDR homes analysed in 2020 had only

one single aspect window (2). This alone, cannot provide suitable levels of natural light for an entire home.

In addition, there is no official standard for the thermal comfort of office to residential PDR conversions, and some even contain windows that do not open at all (9). During periods of high temperatures, the effects of this can be particularly determinantal. The Committee on Climate Change reports that the number of heat-related deaths is projected to increase by approximately 250% by the 2050s due to climate change and the growing ageing population (10). As this issue is only projected to worsen, the lack of national standards in this area is inexcusable.

Solutions

When faced with a problem that is this big, it can be challenging to know where to begin, particularly as the government's regulation of the built environment is disjointed and arguably more focused on deregulation than addressing the existing problems. The government's desire to further separate itself from the problems created through PDR has become even more evident with the decisions to expand PDR that have been made over the recent years. This alone symbolises the fractures within the regulation of the built environment, as PDR homes represent the overall poor quality of many of the nation's new homes.



...must be safe in relation to the risk of fire



...must have, as a minimum, the liveable space required to meet the needs of people over their whole life time, including adequate internal and external storage space



...must have access to natural light in all main living areas and bedrooms



...and their surroundings must be designed to be inclusive, accessible, and adaptable to suit the needs of all



...should be built within places that prioritise and provide access to sustainable transport and walkable services, including green infrastructure and play space



...must secure radical reductions in carbon emissions in line with the provisions of the Climate Change Act 2008



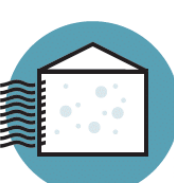
...must demonstrate how they will be resilient to a changing climate over their full life time



...must be built to design out crime and be secure



...must be free from unacceptable and intrusive noise and light pollution



...must minimise and not contribute to unsafe or illegal levels of indoor or ambient air pollution



...must be designed to provide year-round thermal comfort for inhabitants

To find out more about the Healthy Homes Act campaign please visit:
www.tcpa.org.uk/healthy-homes-act

Lobbyists too often ask questions without giving answers. It is easy to get caught up in the endless cycles of debate that make a seemingly simple problem feel insurmountable. While the complexity of these challenges and the multiple stakeholders involved does further complicate the issue, it does not leave it unsolvable. At the TCPA we have developed a tangible solution to this widespread problem.

The Healthy Homes Bill

As a direct reaction to the overwhelming number of new homes that are built without considering the needs of their residents and their overall long-term impact, the TCPA launched the Healthy Homes campaign. This campaign is in partnership with Lord Nigel Crisp and is funded by the Nationwide Foundation. We, alongside our supporting organisations, are working towards transforming the way that the built environment is regulated, to ensure that all new homes promote the health and life chances of their residents.

We have developed legislation – the Healthy Homes Bill – that simplifies and strengthens the regulation of the built environment and ends the creation of unhealthy homes by introducing legally

binding ‘healthy homes principles’. These high-level principles draw on the TCPA’s work on planning outcomes, green infrastructure and public health with the aspirations of the Garden City Principles, to promote a built environment that improves people’s well-being and quality of life.

The 11 principles set out in the draft Healthy Homes Bill (illustrated in the graphic) state that:

- “all new homes should be safe in relation to the risk of fire
- all new homes should have, as a minimum, the liveable space required to meet the needs of people over their whole lifetime, including adequate internal and external storage space
- all main living areas and bedrooms of a new dwelling must have access to natural light;
- all new homes and their surroundings should be designed to be inclusive, accessible, and adaptable to suit the needs of all with particular regard to protected characteristics under the Equality Act 2010
- all new homes should be built within places that prioritise and provide access to sustainable transport and walkable services, including green infrastructure and play space
- all new homes must secure radical reductions in carbon emissions in line with the provisions of the Climate Change Act 2008
- all new homes should demonstrate how they will be resilient to a changing climate over their full lifetime
- all new homes should be secure and built in such a way as to minimise the risk of crime
- all new homes should be free from unacceptable and intrusive noise and light pollution
- all new homes should not contribute to unsafe or illegal levels of indoor or ambient air pollution and must be built to minimise, and where possible eliminate, the harmful impacts of air pollution on human health and the environment, and
- all new homes should be designed to provide year-round thermal comfort for inhabitants.”

This July, the Second Reading of the Bill took place in the House of Lords and it is currently awaiting the Committee Stage. Through this Bill, we are calling on government to amend or bring forward new legislation to make its key provisions law.

In addition to the national campaign, we are currently working with councils and communities to explore the different ways that the 'healthy homes principles' can be used as a framework for improving the quality of new developments in their area, as part of the Healthy Homes local campaign. The project will build capacity through tailored support; secure control over the quality of development despite deregulation; and enable housing development to be a tool for meaningful levelling up.

Conclusion

While there are tangible solutions within the Healthy Homes campaign, this does not mean that we will reach them overnight. There is still a lot more work to be done. Whether it be undertaking

more site visits, lobbying in parliament, or partnering with local authorities and communities to implement the 'healthy homes principles'. And although there may be a long road ahead before we achieve the transformative change that is so needed, I can take solace in the fact we do have – however imperfect – an answer. Now we need the political courage to make it happen.

To find out more about the TCPA and our campaigns visit <https://tcpa.org.uk/>

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Steve is National Head of Planning, Regeneration + Infrastructure, Lambert Smith Hampton with over 30 years' experience of advising both the public and private sectors on transformational town centre regeneration projects. Throughout his career, he has advised numerous local authorities on the preparation of evidence-based strategic visions and investment plans; viability testing and options appraisals; and the planning and delivery of major mixed-use schemes. Led by Steve, Lambert Smith Hampton's national Planning, Regeneration + Infrastructure team has recently helped to unlock over £250m of capital investment for major town centre projects from the Future High Street, Towns Deal, Welcome Back, and Levelling Up Funds. Steve is also an expert adviser to the government's High Street Task Force, and an active member of Revo.

SHOPPING CENTRE FUTURES

What next for UK shopping centres: replace, reinvent or revitalise?

Dr. Steve Norris BA (Hons) MPhil PhD MRTPI snorris@lsh.co.uk

Steve presented the findings of the LSH/Revo report 2022: "Shopping Centre Futures" at the National Conference (see conference write up). Here he concentrates on the key questions and opportunities: "shopping centres also present the biggest opportunities for the creative and radical reimagining and reshaping of retail's role within towns and cities." <https://www.lsh.co.uk/explore/research-and-views/research/22/july/nearly-half-of-uk-shopping-centres-require-radical-reinvention>

It is no secret that the retail sector is facing unprecedented challenges, which have been both highlighted and exacerbated by the pandemic. The rise of online shopping continues to redefine consumer behaviour, while government policy, ranging from business rates to planning regulations, has failed to keep pace with the changing landscape. As if these joint pressures were not sufficient in their own right, we now appear to be plunging headlong into the UK's worst cost of living crisis in a generation.

While all retail types are affected by these ongoing challenges, shopping centres have felt their impact most acutely. This is evidenced by consistently high vacancy rates and dramatic falls in capital values. And yet, shopping centres also present the biggest opportunities for the creative and radical reimagining and reshaping of retail's role within towns and cities. As large assets usually under single ownership, they have the critical mass to enable strategic decisions to be made on how space is used, so that value is added to both the centre itself and the town it serves.

With nearly 20% of UK shopping centre space currently sitting vacant, it is time to accept the reality that it is unlikely to ever

be filled on commercially viable terms. Amid definitive evidence that the country has an excess of shopping centre space, investors and local authorities need to explore alternative solutions.

The key questions to be explored by investors and/or local authorities are what role these assets can realistically be expected to perform, and what intervention is required to help them achieve their potential.

Replace?

For some shopping centres in towns with a significant oversupply of retail space, the best option may be wholesale redevelopment that sees them levelled to the ground and completely replaced with new uses. Most of the current examples where full redevelopment and replacement is being pursued in the UK are either being led by local authorities that are in a position to make bold strategic decisions about a town's retail provision and sacrifice commercial value for the wider good; or private sector projects where shopping centres are located in areas where alternative uses clearly have a higher value than retail.



Government Interventions

What Central Government initiatives/interventions do you think will be most effective in supporting our towns, high streets and shopping centres over the next five years?

Top Five Key Initiatives	2021 (All)	2020 (All)	Private Sector	Public Sector
1. Business Rate reform	77%	54%	80%	64%
2=. Online shopping sales tax	41%	n/a	39%	47%
2=. Support / guidance for town centre strategies & masterplans	41%	19%	41%	36%
4. Levelling Up	38%	n/a	35%	51%
5. Other Government backed funds and/or tax incentives for new regeneration/ infrastructure projects	34%	n/a	36%	33%

Local Interventions

What other measures do you think will help to build greater resilience in our town centres over the next five years, helping to ensure their overall vitality and viability?

Top Five Key Initiatives/Actions	All Respondents	Private Sector	Public Sector
1. Repurpose shopping centres &/or vacant retail space	61%	62%	60%
2. Develop more homes in town centres	37%	37%	42%
3. Introduce more flexible turnover rents and/or lease structures	30%	30%	27%
4. Improve town centre environments/ public realm/ green spaces	25%	21%	38%
5. Provide new uses (e.g. professional services, care, fitness etc.)	24%	24%	20%

Reinvent?

Many shopping centres, particularly those with relatively high vacancy rates, would benefit from significant changes to non-retail uses, while stopping short of being fully repurposed. A condensed retail offer might be supplemented by a varied range of other uses including leisure, residential, workplace, healthcare, education and community uses. This scale of reinvention is likely to require significant redevelopment or regeneration activity and capital expenditure, with varying degrees of private and public sector

involvement. A wide range of innovative mixed-use projects are currently in the pipeline at shopping centres across the UK, which seek to transform them into more diverse modern destinations

Revitalise?

The landlords of better performing retail centres with moderate levels of vacancy may not need to redevelop their assets radically, but a degree of repurposing would still be advantageous so that centres have a broader appeal to modern consumers. While remaining anchored

by their retail offer, many UK centres are being repositioned as leisure destinations, with increased food and beverage options, and cinemas and gyms to attract younger consumers and families. Flexible space for temporary uses such as pop-up shops may also be suitable in these centres, to support a vibrant, evolving mix of tenants

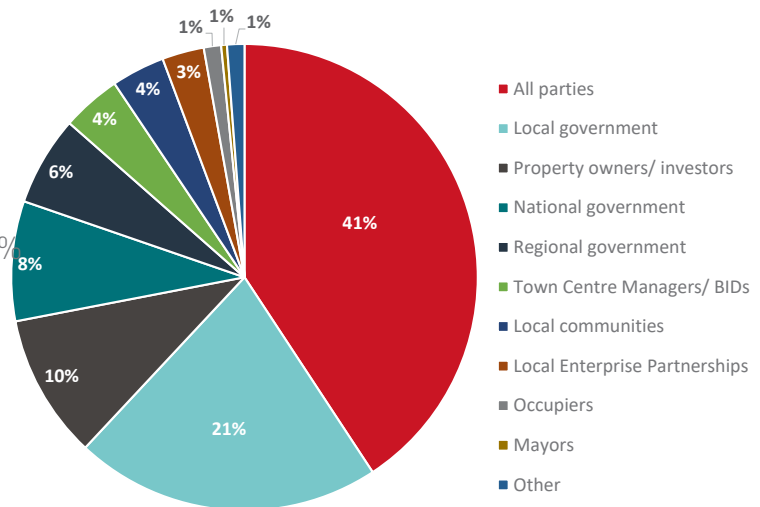
Who can deliver?

The public sector has a key role to play in leading repurposing activity, particularly

Who Should Lead the Renaissance?

Who do you think should lead the transformation and renaissance of our towns and high streets?

- “All parties” – 41%
- Local Authorities - 21%
- Property Owners & Investors - 10%
- National Government - 8%
- Regional Government - 6%




in locations where the commercial viability of projects is challenging. Local councils have been actively acquiring centres for regeneration purposes across the UK, making more than 1 in 5 of all shopping centre purchases since 2016.

Local authorities are spearheading some of the UK's most imaginative repurposing projects. Ambitious schemes such as the transformation of Nottingham's derelict Broadmarsh Centre and the replacement of Stockton-on-Tees' Castlegate Shopping Centre with new urban parks are among the most exciting placemaking projects currently being pursued anywhere in the country.

Private sector investors are also seeing opportunities in the shopping centre sector, making an increased volume of purchases, with a view to adding value through repurposing and repositioning. This helped shopping centre investment to reach a 4-year high in the year to Q2 2022.

Ultimately, blends of public and private sector capital and expertise will be needed to drive forward major repurposing and redevelopment projects. Shopping centres still have important roles to play within towns and cities, but bold new visions are needed to secure their long-term futures at the heart of communities.





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Alexandros joined Savills in July 2021. He holds a MSc in Environmental Design & Engineering from the Bartlett School of UCL. He has extensive experience in navigating planning policy and building regulations and a proven track record of sustainable design delivery across multiple sectors, for clients such as Canary Wharf Group, Great Portland Estates, CO-RE, British Land, abrdn and Savills IM.

REBUILD OR RETROFIT

The environmental case, circular economy and whole life carbon

Alexandros Chalkias - alexandros.chalkias@savills.com

Alexandros poses the question – How should the principles of the circular economy and whole life carbon influence our decisions on how we improve retail assets? “Fortunately, many retail developers and investors are starting to think through the lens of circularity, but the adoption of whole life carbon principles are very much in their infancy and need to be more widely implemented.”

Whole life carbon – the basics

Traditionally, the property industry has measured the performance of buildings using compliance tools, such as Energy Performance Certificates, because they’ve been the most widely understood and accessible metric, and the industry standard for comparison. The industry has focussed on understanding and reducing the operational carbon and cost without looking at reducing material use at the same time. Moving towards a zero carbon future has clarified our thinking on different metrics and methodologies. The industry now looks at how buildings are made, how they are operated, and how they can be re-used before their disposal.

A net zero carbon building is where the amount of carbon emissions associated with a building’s product and construction stage (up to practical completion) and its annual operational energy is zero or negative. A net zero carbon building is highly energy efficient and powered from on-site and/or off-site renewable energy sources, with any remaining carbon balance offset (UKGBC Net Zero Carbon definition).

This is where Whole Life Cycle Carbon (WLC) emissions fall into place as WLC provides a true picture of a building’s carbon impact on the environment. WLC emissions are operational and embodied emissions over a building’s entire lifecycle. Embodied carbon is the amount of carbon emitted during

the construction, use, and end of life stages of a building, e.g. the extraction of raw materials, the manufacturing and refinement of materials, transportation, installation, and the use of a building over its entire life, including its demolition and disposal. Operational carbon is the amount of carbon emitted once a building is in use. Real estate is responsible for 39% of annual carbon emissions; operational emissions account for 28%, with the remaining 11% attributed to embodied carbon of new construction; or to put it another way, embodied carbon accounts for almost 30% of property emissions.

Although both the refurbishment of existing buildings and the construction of new ones have the potential significantly to improve the life cycle impact of buildings, it’s not always a clear-cut choice between the two options. And this is applicable to any type of use, i.e. office, retail etc.

The benefits of reuse

When is it better to reuse and when is it better to redevelop? A major refurbishment can reduce operational carbon emissions considerably by upgrading the fabric and providing equivalent building services to newly built standards. At the same time, it can cut embodied carbon emissions significantly because a big part of the

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embodied carbon emissions of a new build are associated with elements such as the sub structure, upper floors, roof, and frame, which should be retained at a major refurbishment.

On the other hand, new buildings have a better potential for improving operational efficiency as the result of better design and less constraints, i.e. form factor, window-to-wall ratio, passive design measures, energy efficiency measures etc., while new standards and tools can reduce the embodied carbon emissions.

Carrying out a WLC assessment can be used as a tool for assessing the carbon impacts of design options, alongside other factors such as cost, to select which one is more carbon efficient. For instance, measuring the upfront carbon at each stage of the construction will involve breaking a building down into its elemental parts and applying carbon emission factors to the quantities of each element. Take, for example, a building's superstructure: a conventional frame would result in emissions of 500 kgCO₂e/sq m; with a frame that includes timber would result in 350 kgCO₂e/sq m, providing significant savings. Following such a methodology, one can assess whether a refurbishment or a replacement is the more environmentally and economically responsible option.

A WLC study for a new build 320,000 sq ft shopping centre in Hampshire, produced by Sturgis compared 3 scenarios over a 60-year period:

1. A new build where at years 20, 40 and 60 there will be a major refurbishment where the main structural elements are retained
2. A full new build at years 20, 40 and 60 with all new materials
3. A full new build at years 20, 40 and 60 that includes for a substantial proportion of on-site recycling of structural members, cladding and other materials.

Note that at years 10, 30 and 50 there will be a partial refurbishment for all scenarios.

Overall, the findings suggest that the first scenario is the most efficient in carbon terms. The difference between the first and the second scenario, i.e. a refurbishment cycle over 20 years against the full demolition and rebuild is 59%,

whereas the difference between the first and recycle and rebuild is only 23%. This clearly shows the carbon benefits of designing for and undertaking wholesale recycling.

For the last few years, the Greater London Authority (GLA) has been investigating how to best approach WLC. Today, it is progressing WLC assessments as part of its planning policies for all developments. Several other local authorities in the UK are following GLA's example and are also now implementing such policies. In addition, due to the significance of this issue, members of the property industry have written Part Z (Part Z, Whole Life Carbon (<https://part-z.uk/>) and its accompanying Approved Document Z as a proof of concept for the regulation that is needed in the UK. This has now gained traction and has been introduced to Parliament. If enacted, Part Z would ensure that embodied carbon is assessed on all projects, as part of a comprehensive whole life carbon assessment.

Circular economy matters

The evidence is clear: if we're to stay on a net zero carbon trajectory for the lifecycle of buildings, we must change our approach to design, material selection, and use. We need to think of buildings as an evolving process; we need to change our attitude from 'take-make-use-discard' to 'remake-reuse'; and we need to design for dismantling. In other words, we need to facilitate the transition towards a circular built environment.

Circular economy stands in contrast to our current linear system, where materials are mined, manufactured, used, and thrown away. It describes an economic system based on business models that replace the 'end-of-life' concept by reducing, reusing, recycling, and recovering materials in production, distribution, and consumption processes.

Retailers and their buildings are no exception to this. Whether during refurbishment or redevelopment, we need to consider what materials can be recovered and reused. In the recently redeveloped St James Quarter in Edinburgh, Nuveen has diverted almost 99% of site materials from landfill, with a significant proportion of concrete being recycled and reused within the new scheme. Good design has also been adopted to optimise natural light and ventilation to reduce operational carbon.

This has helped Nuveen achieve an Excellent BREEAM In Use Certification.

Circular economy principles can also be applied to retail products. By producing fewer goods that are more robust and last longer, and in turn renting or reselling these, the use of natural resources is reduced as products become the resources. Such principles will become more and more common when regulations that forbid the destruction of goods that haven't been sold come into place – already legislated for in France on January 2022. Similarly, such principles can be applied to the components of retail buildings where fitout components like floor or ceiling tiles can be rented or re-sold at the expiry of the lease instead of ending in landfill.

Designing with future flexibility and adaptability in mind, and building in layers, is also key. Our designs should assess the ability of the development to accommodate change, the frequency of reconfiguration and remodelling, and how to avoid a premature end of life for all components. Designing a retail unit or a shopping centre to be easily adaptable to a different type of use in the future, such as a commercial office or residential space, from the outset, is essential to ensure the carbon impacts of such alterations (fabric, services, layout etc.) are not significant.

Innovative thinking

Our industry doesn't have all the solutions readily available. Technology and innovation technology have a great role to play in this transformation, as they will help us to learn and develop. For example, 3D printing could be used to print a building's components and, as such, reduce significantly material wastage [Ed – see article in 2022 Spring Terrier]. Meanwhile, printers could be deployed on or near to the site and consequently reduce transport emissions. Artificial intelligence can improve efficiencies to drive energy consumption down; by inputting data on equipment energy usage, indoor and outdoor temperature, it can determine precisely the ideal set points and schedules for heating, cooling, and lighting equipment, and provide great savings.

Of course, the argument for rebuilding can go the other way. Many retail schemes are unfit for either future

retailing requirements, or the space requirements of alternative uses where repurposing projects are being considered. We know more about how properties should be designed for the next 50 years than we did 50 years ago and, some would argue, correcting the mistakes of the past and make more efficient places requires redevelopment. However, if we always take this approach, we will be adding to the problem

not solving it, and who's to say in half a century we'll have got it right? Fortunately, many retail developers and investors are starting to think through the lens of circularity, but the adoption of whole life carbon principles are very much in their infancy and need to be more widely implemented.

Climate change has made us think about how we design, build, and operate our buildings in a different and

more holistic way and emphasises the need to achieve net zero emissions. As such, it's raised the challenge and a considered and strategic approach is now required. Our response can't be fragmented, and we should follow whole life carbon and circular economy principles when designing our buildings, to ensure their useful lifetime and resilience are extended.



Clive is a Lead Specialist in place making and regeneration with Historic England, with a background in architectural history, building conservation and urban design. He is also the convenor of the Historic England Places Panel, an independent body of experts who advise places on strategies for renewal.

FLATS ABOVE SHOPS

The untapped potential of town centres

Clive Fletcher Clive.Fletcher@HistoricEngland.org.uk

Clive puts forward compelling arguments to alleviating many of the issues facing ailing town centres by bringing back into residential use empty upper floors of shops. This is a far more sustainable and healthy alternative to the units resulting from PDR conversions evidenced in the healthy homes campaign featured in this issue.

Shop vacancies

Our historic town centres are places that have an enduring charm, and most are the product of centuries of transaction and exchange – social, cultural and economic – that have resulted in places that are quirky and attractive. The challenges facing them are well documented, and their decline a subject of national regret. This has been explained away by the rise of out of town shopping centres, internet shopping, and more lately, the pandemic. It is, however, much more deeply rooted. Importantly, it is not an intractable problem. Some straightforward measures could see them become the hives of commerce, society and creativity that they once were.

It's the shop vacancies that make the headlines, but this figure is dwarfed by the acres of vacant space above them, and this at a time when there is an acute housing shortage. Why is this? Most of our town and city centres have massively reduced numbers of residents from their peak in the late 1940s/50s. The motor car

and the aspirational suburbs are a reason for it – so too was the spree of 1960s/70s urban road building that sliced through and disrupted the complex social and economic ecosystems of urban centres the length and breadth of the country. Places simply became less “liveable”.

They remained however (to a greater or lesser extent) shopping destinations, albeit looking more and more alike. “Clone Town Britain” (New Economics Foundation 2007), documented how every high street had gradually acquired a more or less identical range of shops. Since the credit crunch in 2008 this situation has radically changed, and as we know, few of those names are still trading. What's replaced them are small to medium sized businesses, with smaller budgets and shorter-term business plans. The 25-year full repairing leases that were the norm have been replaced by radically shorter leases with lower yields.

For the investment funds who own the majority of town centre property, this is surely a problem, as it must be for a range of other owners. While commercial rents



and occupancy are dropping, business rates are rising, adding to the difficulties. Interestingly though, only about 10% of rateable value applies to the unused floors above shops, and a similar proportion to rental yield. This space, quite simply, is not earning a living.

An untapped resource

The vitality of high streets is related to the number of people living within walking distance, and this is also related to public health and wellbeing ("Heathy High Streets" Public Health England 2018). According to the Federation of Master Builders 2017 report "Homes on Our High Streets", there is the potential for 3-400,000 homes above existing shops, meaning that there is a vast untapped resource that could revitalise town centres and provide a range of social, environmental and economic goods at the same time. In the area immediately around Nottingham's Old Market Square for instance, surveys have shown that there is vacant space which could accommodate no less than 300 2-bedroom flats.

Research commissioned by Historic England from the commercial property

practice Poynton's ("Nottingham Market Place Residential Capacity Survey" – Poynton's 2019) has shown that the cost of converting upper floors to residential accommodation typically brings a 9-11% annual return on the capital costs of the conversion. Poynton's managing director, James Fairman, is convinced that this is true for the majority of the country. That's quite a compelling case for investment, so why isn't it happening?

One probable cause is the tax penalties levied on pension funds when they invest in residential development, and they just so happen to own a large proportion of town centre property. A lack of awareness of the potential revenue, twinned with inexperience in residential conversions, may also be a contributor. Another issue may be a reluctance on the part of existing ground floor tenants to give up the empty space above for a variety of reasons, from access to security.

Solutions?

This report proposed some remedies to this. One was the creation of zones within town centres where pension funds could so invest without the tax

penalties. Another concerned more local tax incentives using business rates and council tax. Put simply, for a fixed period, business rate discounts could be granted to properties that generated a council tax return through a new residential conversion, incentivising the ground floor tenant to release upper floors or (alternatively) incentivising someone (for instance a start-up) to take on a ground floor lease in cases of vacancy.

At a physical level, work done through Historic England's High Street Heritage Action programme has shown that the majority of shop fronts originally incorporated separate street access to the upper floors, the reinstatement of which is very often straightforward. The image illustrates a shop front restoration and associated apartment conversion project in Wheeler Gate, Nottingham, funded by Historic England, as part of the Nottingham Heritage Action Zone.

Such practical solutions could boost the local retail economy, provide quality homes, and civilise town centres by introducing passive surveillance or "eyes on the street" - to quote the urbanist Jane Jacobs. It also provides a substantial additional income stream to enable repairs and proper maintenance - it is no surprise that most of the conservation areas on the Historic England "Heritage at Risk Register" are located in town and city centres.

Council's tax revenues would benefit, at a time when most councils are experiencing year on year reductions in their budgets. If the idea caught on, the conversion works in themselves would give a huge boost to the construction sector, with knock-on effects for the Treasury. Environmentally it is also a win-win, as new homes in converted properties are inherently low-carbon because they haven't had to be built from scratch, and by living in a town centre, reliance on the motor car is vastly reduced.

To achieve all of this would of course require amendments to legislation, and at a local level, a considerable amount of strategic policy making. However, when one considers the Herculean place-making efforts of public bodies in the past 20 years to improve the physical environment of town centres to make them fit for people, the potential gains are surely worth it?



WORKSPACE TRANSFORMATION

Navigating the workspace transformation – where to start?

Anna Scally Anna.Scally@avisonyoung.com

Anna is Director – Workplace Solutions at Avison Young. Her interest in the workplace, and in particular the ways in which it can be shaped to enhance occupants' wellbeing, is longstanding. She has been with the firm for over 15 years, delivering office refurbishment and fitout projects for key organisations across a range of sectors.

Through her work she has gained a deep understanding of the complex interactions between occupants and their working environment, and how wellbeing can be augmented through sensitive design – boosting productivity. With a BSc in Psychology, Anna also has an acute awareness of the importance of mental health in the workplace.

Having read the excellent “The X Factor” report, I asked Anna to write this article, which concentrates on the practical side of undertaking successful workspace transformation. A long-standing supporter of ACES, may I now welcome the company as a Corporate Member and a new advertiser.

<https://avison-young.foleon.com/x-factor-2021/workplace-transformation-after-covid/a-new-era/>

No one needs to tell you that things have changed in the wake of the C-19 pandemic, and there is no doubt that our social fabric will continue to be impacted for years to come. But within this disruption are ongoing opportunities for the workplace to make progress on overdue structural and social issues, enhancing and evolving outdated approaches for everyone's benefit.

When guiding organisations through considerations around the new era of work, new employee archetypes, and how to optimise their workplace strategies for now and for the future, an honest, ground-up review is required, with new structures rebuilt around the central focus on people and the individual organisation's core needs.

A playbook for organisations to consider both place and people

We refer to our workplace value proposition as the X Factor: that unique combination of options and opportunities that will maximise employee experience, productivity, and attraction and retention, all while future-proofing workplace strategy. The X Factor methodology has evolved through conversations with

clients across the public, private and third sector, allowing us to pinpoint several critical success factors.

So, how can an employer optimise the overall workplace experience for a variety of generations, personality types and working styles? How do we navigate the tug of war between employee and employer with regard to in-person work, the hybrid model, remote work, or any other variation that may evolve?

Addressing these pivotal questions can greatly impact overall efficiency, productivity, and competitive positioning in the war for talent. This is particularly important for the public sector; 71% of UK public sector employers are currently recruiting, according to the latest [Hays Salary Guide](#). In an increasingly competitive job market where sought-after digital skills are lured by corporate salaries, the public sector can be a fit challenger by providing an attractive, flexible, and future-proofed workplace.

The challenge to designing a workplace that fits the bill here is universal in nature. In a [2021 global survey](#) by workspace experts Leesman, only 15% of respondents advised they would return to office full-time, a sentiment that hasn't moved on

significantly since – when Stanford University surveyed UK workers in February 2022, 23% indicated they'd be willing to find a new job if forced to go back to the office full-time. Yet further diving into the analytics reveals that employees who work in a high-performance workplace (in other words, a workplace that supports the work activities that are important to employees) wanted to return to work more frequently. This confirms what we've long-observed through our own experience partnering with clients: better-designed offices centred on facilitating collaboration deliver more opportunities to attract, engage and retain talent.

It may feel like an unsurmountable challenge, and with ongoing uncertainty, organisations may be keen to adopt a 'wait and see' approach to their office requirements. However, inertia may risk your organisation falling behind. Oftentimes the first steps towards a workplace that works for your employees are more straight-forward than expected.

A five-step process to get you started:

1. Project mobilisation - Mobilise all resources, documents and team members involved in the process

Diverse perspectives create better outcomes. That's why this step typically includes a combination of real estate, human resources, technology teams and data sets. We also recommend that cross-generational demographics are represented in the core project team to ensure diverse points of view inform the process.

2. Workplace research and assessment - Conduct workplace research assessment

Clearly articulate the organisation's current state and desired future stated workplace options. Some of the key items to assess include:

- Confirm organisational strategy, operations, vision and mission
- Assess current employee population including key roles, functions, demographics and tenure
- Identify work processes, performance metrics and outcomes relevant to the business

- Observe and document current workstyles, ways of working, workplace utilisation, dynamics etc.
- Engage with employees and key stakeholders through surveys, observation studies, workshops etc.
- Understand current IT program and HR policies and strategies
- Confirm all policies for ESG, diversity and inclusion, wellness, innovation, etc. that influence the workplace.

3. Findings and recommendations

- Advance key findings and recommendations based on the analytics

- Conduct options analysis for range of alternatives and share findings that identify KPIs and decision-making processes. From there, identify strategy and alignment with workplace design considerations
- Advance a decision-making process and key criteria against which to evaluate options
- Define the Employee Experience – both virtual and physical. Rank the core decisions and desired outcomes
- Ensure the process provides for flexibility, adjustment, mistakes, and pivots wherever possible.

4. Conceptual design - Advance concept designs for your workplace

- Engage key stakeholders through the process, develop test fits for sample spaces
- Introduce pilot studies to reflect the key findings from stage 3 and to start the change (behavioural and physical) process and introduce measurement criteria to understand the success and failures of the space
- Identify what existing facilities, furniture and equipment can be reused and repurposed to reflect the new workplace. These will have been identified through the workplace utilisation study. A new workplace doesn't have to mean starting from scratch!

5. Technology assessment - Develop your technology strategy to support in-person and remote employees

- IT infrastructure such as Wi-Fi

network connectivity, remote access to work files and AV equipment are seen as even more important to employees than before the pandemic, with many employees stating that their day-to-day technology at home is more advanced than in the workplace!

- Ensure the virtual experience aligns with the in-office experience for a seamless workplace for all employees. If a system is too complicated to use, or there is any doubt on its reliability, it will not be used, and employees will default to the easiest option (which might be at home).

Workplace quality is paramount

Creating a physical employee experience starts with understanding space requirements, calibrated to a specific organisation and unique employee workstyles.

If the public sector wants to attract a diverse and inclusive workforce that's representative of the population it serves, its workspaces need to cater to a range of activities, working styles, needs and demographics. They need to be destinations that employees want to go to, that support how they work throughout their day.

While less headline-grabbing than the perks some employers have used to encourage people to spend time in the office, for example yoga or free lunch, providing certain amenities and design updates may have a bigger impact on drawing workers in. Compared to pre-pandemic, the physical features considered more important by hybrid workers are small meeting rooms, quiet rooms and desk booking systems, but working through the above checkpoints will clarify different preferences unique to your organisation.

Combining our insights with those from Leesman's recent surveys, there have been many shifts in what employees deem an important activity now compared to pre-pandemic. One significant change discovered was the shift in emphasis on collaborative work to individual activities. Collaborating on focused work was no longer in the top five most important work activities for the recent respondents. Instead, individual routine tasks became

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one of the top five most important activities. Considering the importance collaborative work has on knowledge sharing and fuelling innovation, this may be slightly concerning, and organisations need to consider how to promote and facilitate a renewed emphasis on collaboration through office design and management.

Design must go hand in hand with cultural change – some core elements to consider

Organisations are increasingly moving toward activity-based work (ABW), designed to give employees the ability to move around the workplace based on their schedule and specific needs. Utilising ABW helps transform outdated, traditional paradigms - with typical 9-5 hours and assigned seating - into a modern, flexible workplace. This way of working assumes mutual trust, and allows employees to work anywhere, anytime – within specified parameters. However, transforming the traditional workplace to an activity-based workplace requires a change in mindset. ABW challenges organisational leaders to ask: “What do people, regardless of their job title and expertise, need?” Then, they need to empower people to use whichever spaces they see fit for as long as they need.

To get to that point, many organisations need to make a cultural shift and tackle several core elements:

1. Design

Harness the power of your workplace by designing a variety of space types under one roof, otherwise known as the “kit of parts.” The design maximises flexibility and ease for employees to use space based on their specific requirements. For instance: if one should need a space for heads-down work, one can easily secure a desk in an office, workstation or library where it is understood that quiet is required. If an employee needs to host a meeting in a large conference room, they can book one for their group instantly. Alternately, if a team simply wants a quick opportunity to collaborate, they can readily find technology-enabled collaborative pods nearby. Whatever the activity, there’s a corresponding space type, ready and waiting and easy

to secure with minimal administrative effort. This ease of use is critical for adoption and long-term success.

2. Sensory experience

ABW spaces need to provide employees with explicit and implicit cues about how to use a space. Whether they need to access high- or low-energy space on a task-by-task basis, employees should be able to gauge easily which space is right for them in the moment. Take, for instance, the kitchen: as a high energy space, you expect the stimulating smell of freshly brewed coffee and the buzz of others mingling in the space. All of these elements collectively draw people for activated collaboration. Other spaces, like libraries, are quiet from the moment you walk in, providing you with enough mental space to focus on your next report or write up a set of meeting minutes. In this way, employers can establish thoughtfully different space elements to provide behavioural cues to ensure clarity and mutual respect in the workplace.

3. Behavioural reinforcement

With optimal ABW design and sensory cues, people are aware of space expectations: being quiet in the study, using phone booths for calls, bringing personal belongings with them to allow others’ use of a space, and feeling empowered to use the space as it suits them. However, no amount of free coffee will encourage a team to have a meeting in the kitchen if their leaders frown on them being away from their desks.

4. Iterative learning

Employees are truly empowered to adopt a new work style such as ABW when leaders fully embrace the change in mindset, combined with the design, behaviours, and programming of an ever-evolving workplace. When leaders are committed to creating a feedback loop through qualitative and quantitative data, and implementing those findings to improve the workspace, they’re helping to ensure their space will be a success.

Once these fundamentals are considered, each organisation can complement its workplace with additional draws to encourage employees back in. For example, wellness

and wildlife weeks; sports days or even street food markets (but not table tennis as it is too noisy!).

One size does not fit all

Yes, this well-trodden cliché still applies. Every employee has unique requirements for their employer and workplace. As a result, when revisiting the overall employee experience, it’s crucial to understand key issues for every employee profile in order accurately to design and programme your workplace. Spaces need to be flexible and future-proofed to ensure that they can readily adapt to always changing requirements.

While many organisations recognise that physical office space is not essential for all day-to-day operations, one fundamental necessity that remains is the need for human connection and social interaction, of particular importance for the public sector, where so much of the daily job focus is on supporting our communities. To flourish, workplace ecosystems require proximity of people, ideas, and innovation. Organisations that can address employee needs and preferences across a variety of work-type environments – providing a workplace that attracts and inspires people, while giving them the freedom to choose - will win the war for talent, increase productivity, reduce unnecessary costs and reduce employee turnover.



Mark has an MBA and is an alumni of the Ashridge Business School Advanced Leadership Programme. He has worked at a senior level in both the public and private sector as well as a government backed advisory company. He has extensive experience of public private partnerships and the commercialisation of public services. He manages CIPFA's property training programmes and advises on wider property issues.



PFI PROJECTS

How to prepare for contract expiry

Mark Poppy Mark.Poppy@cipfa.org

Mark alerts readers to the approaching expiry of PFI contracts and outlines key messages from the CIPFA webinar.

Approaching PFI contract expiry

Private finance initiative (PFI) projects tend to be long-term, usually lasting for a period of 25 years or more. There is an active secondary market for equity interests in PFI projects: original project developers exit, and new longer-term investors hold projects to maturity. Notwithstanding this longer-term investment horizon, as time goes on, it is only natural that parties tend to focus more on day-to-day operations and portfolio management and less around the ultimate backstop of expiry.

However, contract expiry is becoming an increasingly pressing issue. There are over 550 current PFI contracts. Of those, 78 projects are due to expire before December 2027 and a further 91 projects will expire in 2028-2030. The nature of PFI contracts means that significant claims can arise in relation to handover of assets. Typical PFI contract structures employ limited equity and special purchase vehicles. In addition, construction contractors have long since exited from their typical 12-year defects liability period in a 25+ year concession. This means that long-term investors can be exposed to contractual liabilities on expiry.

On 16 August 2021, the Infrastructure and Projects Authority (IPA) released a support plan for contracting authorities, "Managing the Risks of PFI Contract Expiry". The support plan aims to prepare public authorities for the expiry of PFI contracts and the handover of PFI assets. The IPA's plan emphasises the importance of early engagement with

the private sector and aims to smooth the transition process by undertaking a structured process of engagement with private sector counterparties. This work was then supported by the "Preparing for PFI contract expiry guidance" which was published on 28 February 2022.

To respond to this, CIPFA arranged for further introduction to PFI exit strategies webinar on 26 May 2022. We heard from speakers from the organisations: Infrastructure and Projects Authority, the National Audit Office, Bevan Brittain, Grant Thornton, Peopletoo and CIPFA.

Key messages

The following are some key messages from the webinar, which will be run again on 22 November 2022.

- The guidance is you need to start preparing early; most of the speakers stated you need to start planning 7 years out. You need to ensure senior management buy in, determine what support will be required, how it will be resourced, governance arrangements, plus a robust programme plan
- Your organisation needs to have a clear strategy of how it wants to exit and what will be in place post PFI. And processes – having clearly understood goals is vital
- Planning future services (asset requirement and people aspects) - how will they be delivered: inhouse, current contractor, out to the market. Option appraisal and business planning will be key

- Often forgotten is the detail within the actual contract: do you, have it? What has changed? Has this been documented? Are there gaps? And the risks
 - The Unitary Charge on your PFIs are RPI/CPI linked and therefore you are going to see some significant increases. This makes progressing operational efficiencies work (which will ultimately help when you get to expiry) so much more important
 - Good contract management is as vital towards the end as it was at the start and during the intervening years. It will put you in the best position when the negotiation process to exit starts
 - Over a 25-year period the assets and their condition will have changed; knowing this, and having detailed surveys in place will be very important
 - Engage with Special Purpose Vehicles and know the key stakeholders to build a collaborative approach to the exit is the better option
 - Finally, support is around from a variety of public and private organisations. You need to think about this early as well, as there is likely to be a rush for this if you have not started early.
- CIPFA has a well-developed approach to operational efficiencies, PFI amendments and PFI expiry, which members of its

team have used across a wide portfolio of PFIs, including some very high-profile projects. CIPFA's approach/offer includes upskilling your team, such as through the upcoming CP3P courses. CIPFA believes 2 days of training of your team will provide a significant payback.

The PFI exit strategies webinar will be run again on 22 November 2022 (see <https://www.cipfa.org/training/accredited-training/cp3p>). If you require any further information at this stage, please do not hesitate to contact CIPFA.



Richard is Group Business Development Director for the Norse Group. Richard has over 30 years of experience in the built environment for the private and public sectors, and a key leader of the executive team charged with strategic client retention, new client acquisition, and revenue growth. Cultivating long-term relationships and joint venture partnerships, Richard builds successful pipeline opportunities for public sector clients, creating new revenue streams and growth. Richard's 'raison d'être' is to support, help and assist public sector clients, their communities and residents, to work and live well within the built environment. He is passionate about our planet!

THE SKILLS GAP

Rising to the challenge addressing capacity, the skills gap and ability to deliver social infrastructure at pace

Richard Gawthorpe Richard.Gawthorpe@norsegroup.co.uk

Richard examines how local government and the wider public sector can respond to rising demands on property services, while grappling with capacity within their organisations. This is a response to Q&A sessions at the National Conference that 'capacity' was a real issue with ACES colleagues, hence this 'thought piece'. A summary of Norse's presentation on a housing development is contained in the conference summary in this issue of ACES' Terrier.

Severe shortages in labour and expertise, the ongoing impact of years of cuts in funding, and now the unexpected and devastating effects of C-19, have left public sector organisations with severe gaps in capacity, especially when it comes to the built environment.

According to research published by PricewaterhouseCoopers (PwC) in May (1), most employers are already experiencing skills shortages within their workforces – or expect to have such shortages within the next 5 years. Some 33% of respondents were suffering a shortage in core business

skills, such as teamwork, leadership, relationship building, and communication skills, while a further 41% expected shortages in the year ahead.

The research also revealed there was a real need for capacity building for the net zero transition, with 76% of employers already stating they have a shortage of the skills needed to support the move.

And, certainly, local government is no exception to this situation, particularly in the field of property services and the built environment.

Background and evidence

Joanne Roney, president of chief executives' group SOLACE, has warned of a recruitment crisis in local government; a recent survey by the organisation highlighted that 9 out of 10 of its members were "concerned about the pipeline of staff with the appropriate skills/qualifications to work in the most senior roles in the council over the next 3-5 years" (2).

It is true that this crisis appears to cut across all areas of employment, yet within the public sector there are additional challenges. For example, as highlighted recently by the Chartered Institute of Personnel and Development (CIPD) in its Labour Market Outlook (Spring 2022) report (3), there is less flexibility to respond to recruitment and retention challenges with increases to pay and other benefits arrangements.

Within property, asset management, estates surveying and the built environment, we are seeing large gaps within teams where specific expertise and experience are required. This is a subject that we at the Norse Group, a 100% local authority-owned company, often hear about via our teams at our multi-disciplinary property consultancy, Norse Consulting.

A recent study by Macdonald & Company in June 2022 (4) highlights that property professionals in the private sector who have moved to new employers or received a counter-offer after intending to resign, have received an average salary uplift of circa 18%. This demonstrates that the current job market is very much candidate-led, with employers needing to offer increasingly competitive salaries to attract and retain the best colleagues. This in turn is leading to swathes of property professionals being tempted into private practice. This situation has obviously only been exacerbated by the current cost of living crisis.

So, as the country recovers from the pandemic, and with local government at the very heart of rebuilding lives and livelihoods within communities, how can we address the immense challenges in capacity, the skills gap and ability to deliver within our property teams?

Local authorities are usually at various maturity levels in their service scope and delivery; this can often determine the type and level of support required to assist with a shortage of capacity. This can be from "packaging-up" work to be delivered externally, to "supporting" the in-house

team, or "strategic" support to enable the scope of the service to be defined, executed, and delivered on the ground.

The good news is that solutions are available to maintain resilience, build capacity and deliver desired outcomes at pace. Some of these solutions are more suitable for achieving short-term results, while others are more workable in the longer term.

Short-term solution/traditional procurement route

One such option for local authorities might be the traditional procurement of services from a supply chain and, indeed, this can work particularly well within property services. In this scenario, and in accordance with the Public Contracts Regulations 2015, the public sector can competitively tender discrete pieces of work that can be packaged up and delivered by the private sector.

Alternatively, these discrete pieces of work can be packaged up and tendered through national frameworks, either competitively or by a direct-award arrangement. One advantage of using a national or regional framework (PCR15 compliant) is that members (the supply chain) of the framework have already been vetted, approved, and demonstrated a proven track record.

There are numerous benefits to this approach, including reducing overall procurement costs and internal resources to the buyers, expertise in the chosen field being procured, as well as the building of long-term relationships with the supply chain. Interestingly, in April this year, Crown Commercial Service (CCS) (5), the UK's largest public procurement organisation, and the Department for Levelling Up, Housing and Communities announced that they aimed to boost commercial capability across local government through a new contract management training programme.

CCS now envisages that almost 200 local government officers will complete the Contract Management Pioneer Programme over the next 12 months.

Competitive tender/blue light services



Over the past 30 years, Norse Consulting has secured many commissions and medium-term

contracts, following its inclusion on a number of frameworks and enabling it to develop fruitful and long-lasting relationship with clients. Among these, for example, are the professional property services it provides to blue light services across the country, including Devon and Somerset Fire and Rescue Service and Dorset Police.

Furthermore, Norse Consulting's professional property teams have recently had their contract with Norfolk and Suffolk Constabulary extended, won a new contract with Derbyshire Constabulary and Fire Services, and been appointed as an approved consultant on the East of England Ambulance Service Framework. And in August 2022 Norse Consulting will be providing asset and insurance valuation services for the police authorities in South Yorkshire, West Yorkshire, Humberside and North Yorkshire, and North Yorkshire Fire and Rescue.

https://norseconsulting.co.uk/projects/blue-light-services/?utm_source=brochure&utm_medium=QR+code&utm_campaign=ACE+conference

Short to medium term solutions/interim management and delivery

The so-called "era of the Great Resignation" has left significant talent gaps across local authorities and resulted in calls for greater investment in the management tiers of tomorrow. The "Future of Local Government", a report published by PwC and the County Councils Network in July 2021 (6), suggested more flexible working arrangements and greater technology and automation might provide solutions. Many councils have capitalised on the progression of agile working to allow staff to have more flexibility around their roles and expectations, as well as delivering some real estate benefits, from reducing floor plates to enable reduction in running costs.

The private sector is also attracting staff, who appreciate flexibility in the workplace and might not have previously considered this area. Reduction in commutes and the culture of long hours at a desk are changing. Today's younger workers often want flexibility across all dimensions, an opportunity to exercise their entrepreneurial spirit, and an employer

that promotes their well-being. They also care a good deal about compensation, and not as much as prior generations about a possible pension. More than any other factor, Deloitte's Insight - 23 May 2022 (7) suggests this shift in workers' values has made the traditional "employee value proposition" of the public sector less appealing for many.

In fact, SOLACE highlighted in its written evidence to the House of Lords Public Services Committee (8) recently that the government urgently needs to create a "recruitment campaign" promoting the benefits of working in local government and the wider local public sector, to help ensure the sector has the capacity to deliver services for its communities.

The public sector does therefore need to channel other benefits to attract new talent, such as capitalising on the social value aspects of the work it delivers, and emphasising its agility and great purpose within the community. But, in the meantime, leaders with expertise and experience are desperately needed and interim management can provide a solution.

According to the 2020 Interim Management survey (9) from the Institute of Interim Management, approximately one-third of interim management now takes place within the public sector.

Interim Head of Property/Cambridgeshire County Council



Again, Norse Consulting has seen significant success in this area; it has recent examples of this type of placement to support the senior teams within councils. In its experience, bringing a new leader in from outside the local authority allows an independent review to take place to determine the strengths in a team and where support and development is needed, to ensure cohesion and efficiency of that property team moving forward.

An Interim Head of Property Services is also able to break down barriers and facilitate a more effective and efficient operating model with a buy-in from the existing team.

https://norseconsulting.co.uk/projects/head-of-property-interim-support/?utm_source=brochure&utm_medium=QR+code&utm_campaign=ACE+conference

Long-term solutions/partnerships

Long-term solutions to the problem of addressing capacity in local government are available, whether they are with the private or public sectors – and these partnerships can be extremely effective. They can absorb the transient workload during peak times, upskill existing staff, bolster against the unforeseen and offer senior officers the time and space to look to the longer term. Furthermore, they allow flexibility in responding to priorities; bring job stability and security and offer community sustainability, helping to keep jobs and any financial surpluses within the local communities.

At a recent Local Government Chronicle (LGC) round table event (10) a high-level panel of local government officers reflected on what the best partnership models might be. And LGC editor Nick Golding, chairing the discussion, said: "Partnerships have been absolutely at the centre of local government's response to Covid and are now at the core of so much local government does."

Public to public partnership for the built environment/London Borough of Waltham Forest



Since 2007, Norse Consulting has had a long-term partnership with the London Borough of Waltham Forest, delivering built environment professional services, and supporting social infrastructure, schools, and corporate buildings. The joint venture (JV) and its supply chains have created between 30 and 70 jobs p.a. since 2007; approximately £70m has been invested in schools, and more than 4,000 new school places have been created.

Norse Consulting has supported the council in delivering over 1,200 high-quality new homes, including 134 affordable new homes delivered on 21 brownfield or garage sites, alongside providing expertise to its housing delivery company Sixty Bricks and capital delivery teams. Now named Evolve, the JV and its operating model has been reset again under a new 5 (plus 5)-year agreement, which will continue to provide professional services supporting the council's ambitions.

https://norseconsulting.co.uk/projects/norfolk-county-council/?utm_source=brochure&utm_medium=QR+code&utm_campaign=ACE+conference

[council/?utm_source=brochure&utm_medium=QR+code&utm_campaign=ACE+conference](https://norseconsulting.co.uk/projects/norfolk-county-council/?utm_source=brochure&utm_medium=QR+code&utm_campaign=ACE+conference)

Capacity for delivery

The current situation with a shortage of capacity does make working within the built environment in the public sector challenging, yet there is light at the end of the tunnel. The government is investing significantly in infrastructure and place.

The first round of allocations of the £1.7bn Levelling Up Fund has been announced, promising investment in the infrastructure that improves everyday life in the UK. Now, however, we need to turn our attention to delivery – and, once again, that raises the issue of capacity and appropriate skills and experience within local authority teams.

Even just drumming up the resources to dedicate to bidding for this funding is resulting in overstretched teams struggling with capacity. As Pooja Agrawal, CEO of Public Practice (11) wrote in the MJ after last autumn's budget, there is a Catch-22 situation here. She said: "Authorities with already stretched resources (will have to divert) capacity and time to bid for this funding, leaving some authorities with no resource to even consider bidding for funding, therefore deepening the resource gap." [Ed – see also panel discussion involving Poona in the national conference write up in this issue of ACES' Terrier].

Property, estates and design partner/Norfolk County Council



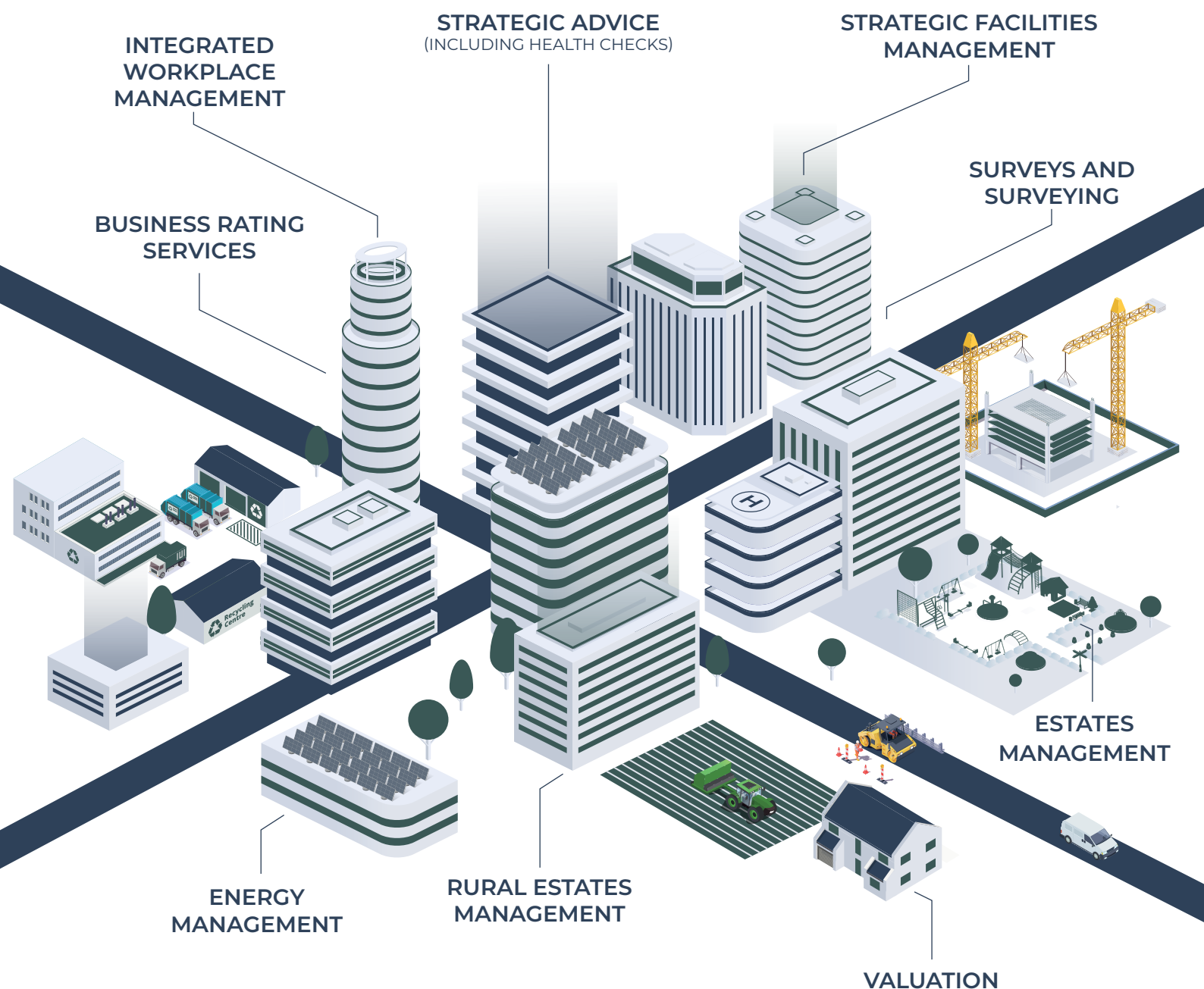
Having been Norfolk County Council's property and multidisciplinary design partner for over 25 years, Norse

Consulting has a close relationship and partnership with the client, and this ensures the property needs of the authority are consistently met.

Sharing best practice, knowledge and experience gained from its suite of offices across the UK, Norse Consulting continues to provide resilience, capacity, and expertise to meet an ever-changing property landscape.

https://norseconsulting.co.uk/projects/norfolk-county-council/?utm_source=brochure&utm_medium=QR+code&utm_campaign=ACE+conference

DELIVERING TOTAL ESTATES AND ASSET MANAGEMENT



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A different approach/in conclusion

The “unprecedented” global pandemic has taken its toll on the public sector and left many local authorities reeling. From the moment it hit, it required new ways of thinking and very different approaches, and that is what is also required when it comes to dealing with this issue of capacity.

Local government has no alternative but to step up now and look ahead with new purpose. There are short and long-term solutions to dealing with the issues of capacity and shortage of skills, especially within the built environment. And among those is the option of working in partnership with a trusted public sector partner like Norse Consulting.

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Jen is a partner and co-founder of Property Elite.

RICS REVIEWS

An overview of the RICS Reviews

Jen Lemen BSc FRICS

“The Levitt, Bichard and Pereira Reviews have called for wide ranging change in the industry, relating to a variety of issues, themes and concerns.” Jen outlines the subject matter, main findings and recommendations for each of the reviews.

2021 and 2022 have been the years of RICS reviews. We have seen 3 key reviews in this period of time: the RICS Independent Review by Alison Levitt QC, the RICS Independent Valuation Review by Peter Pereira Gray and the Independent Review by Lord Michael Bichard.

The Levitt Review

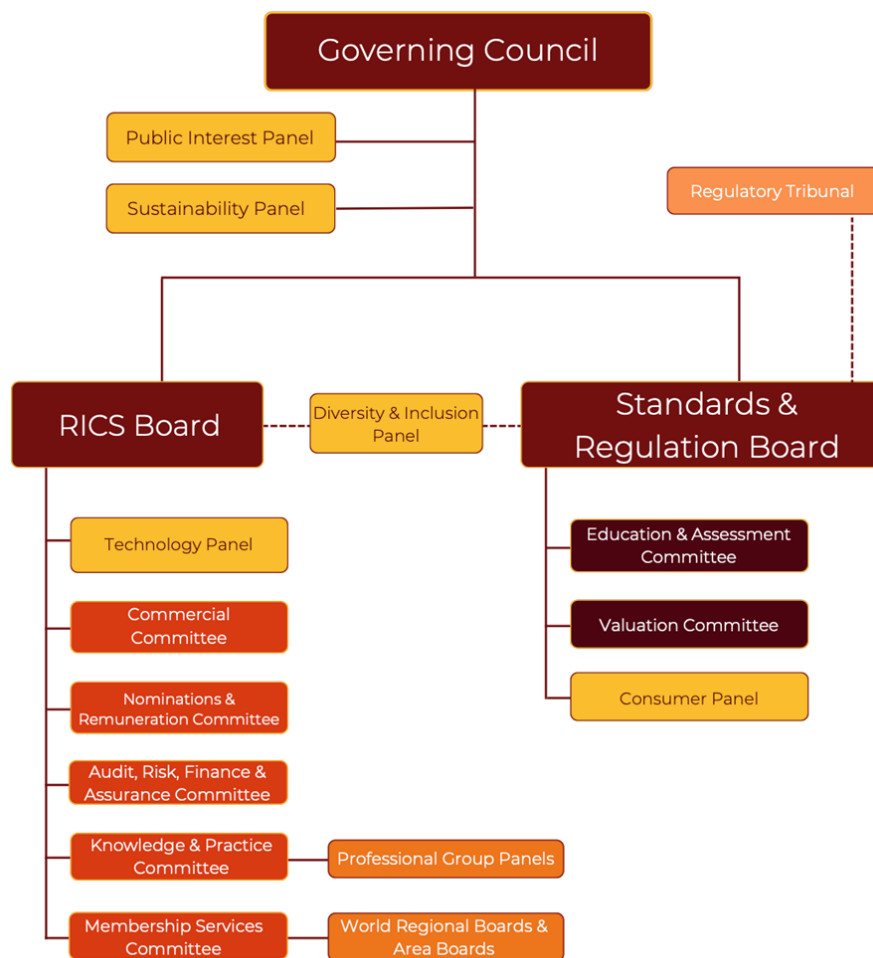
The first Independent Review by Alison Levitt QC was commissioned by RICS to investigate articles in the press alleging that RICS ‘tried to suppress a critical internal

report into its finances in 2018/2019 and then unfairly dealt with those who sought to explore the issue’.

This Review set out to consider the way that the internal report was commissioned and dealt with, to consider whether any shortcomings represented a governance failure and to make recommendations for the future.

Alison Levitt QC concluded in the report that sound governance principles had not been followed by RICS. This included a lack of clarity around the roles and responsibilities of various RICS Boards,

PROPOSED GOVERNANCE STRUCTURE



- Re-focussing the Royal Charter and purpose of RICS, including the commitment to the public interest and advantage
- Giving responsibilities back to areas and regions, while maintaining global consistency
- Separating out commercial activities
- Reinvigorating RICS Matrics
- Focussing on diversity and inclusion
- Improving the use of technology
- Clearer frameworks, e.g. for the Standards & Regulation Board
- Setting up a fund for public interest activity
- Developing thought leadership
- Clarifying how clients can seek redress for inadequate service
- Setting up a consumer panel
- Carrying out independent reviews on a 5-yearly rolling basis
- Improving membership engagement
- Improving RICS staff and member relations and overall customer service
- Improving internal governance and remuneration processes
- Reviewing Professional Group Panels
- Introducing new appraisal and evaluation processes.

senior leadership and management, and a lack of scrutiny at the very top level. This led to a struggle for power, rather than a cover-up, with a collective failure of common sense and an unnecessary escalation of the situation.

The Review provided 18 specific recommendations, relating to governance, executive remuneration, whistle blowing and legal advice. This specifically included the commissioning of the Bichard Review, which happened in December 2021.

The Bichard Review

The Bichard Review was published in June 2022. It explored the purpose, governance and strategy of RICS. The aim of the Bichard Review was to 'create a new sense of purpose and direction so that RICS can once more stand tall as an exemplar

professional institution, capable of tackling the challenges which will shape the way we all live in the years to come'.

The Review was wide-ranging, including a call for evidence, 551 submissions, 90 meetings and 372 participants taking part in round table discussions.

The Report itself is split into 6 chapters, starting with an overview of the history and purpose of RICS, before moving onto the current and proposed strategy for RICS, RICS regulation and the public interest mandate, membership engagement issues, culture and values and finally, the RICS governance structure (see image).

The Bichard Review provided 36 recommendations, all of which are practical and focus on making RICS a more capable, modern institution. Some of the key recommendations are:

The recommendations will be rolled out in a series of phases, through 5 working groups in the following areas:

1. Transitioning the responsibilities of the Chair of Governing Council to the President, recruiting a new Chair of the Board, leader of the Executive and Chair of the combined Nominations and Recruitment Committee, and undertaking various consultations
2. Transitioning the responsibilities of the Management Board to a new Management Board, recruiting or appointing a Senior Independent Governor and other members, and conducting elections for geographic Governing Council seats in early 2023
3. Establishing new key Committees, Professional Group Panels and World Regional Boards and electing new disciplinary Governing Council seats.

RICS is currently calling for members to get involved with the formation of Professional Group Panels, focussing on specific professional disciplines.

Many of the principles of the Bichard Review recommendations can be applied in both the private and public sectors. These could include:

- Having a clear and defined purpose and strategy, and ensuring that this is followed and believed in by staff and key stakeholders
- Committing to working in the public interest and providing a high standard of service
- Carrying out regular service reviews and staff appraisals
- Ensuring clients have a clear process to raise complaints, concerns or feedback
- Improving engagement with staff, customers and clients
- Setting up internal boards or working groups, e.g. to focus on diversity and inclusion or specific areas of practice
- Improving the use of technology to deploy staff resource in the right areas
- Focussing on diversity and inclusion in all areas of business and ensuring that the right messages are communicated to staff
- Developing thought leadership within teams and the wider business.

Gray Independent Valuation Review

Moving on to a more specific review, the RICS Independent Valuation Review was commissioned by the RICS Standards & Regulation Board and led by Peter Pereira Gray, Managing Partner and CEO of the Investment Division of the Wellcome Trust.

The Review focussed on the valuation of assets for investment purposes, seeking to futureproof and provide recommendations to deal with market changes, such as the impact of C-19 and structural shifts in occupier and investor demand.

Specifically, the Review focussed on investment valuations which are relied upon by third parties, thus typically being higher risk and where public confidence must be held in utmost

regard. Such purposes include financial reporting, inclusion in prospectuses, circulars, takeovers and mergers, collective investment schemes, unregulated property unit trusts, and commercial investment property funding.

The Review made 13 recommendations, covering a range of issues. Most of these are highlighted below:

- Governance arrangements to commission and receive valuation reports should become more standardised
- Valuation and advisory activities in firms should be separated
- Valuers should be rotated on an RICS-directed basis
- A new Valuation Compliance Officer role should be set up, to complement the existing Responsible Principal role
- Clearly signposted processes should be set up to raise concerns about valuation instructions and valuer conduct
- RICS should set up a quality assurance panel for valuation work
- The Red Book should be updated to provide further best practice or mandatory guidance around valuation audit trails and reporting
- Valuers should consider the use of more analytical approaches to complex valuation work, such as the use of discounted cashflow modelling (DCF) or advanced valuation modelling
- RICS should regularise and document valuation standards used outside of the UK
- A framework for standardised property risk advice should be developed by RICS
- RICS should continue to promote diversity and inclusion within the valuation profession
- RICS should promote the importance of professionalism and ethical behaviour within all valuation work.

In relation to the use of DCFs for investment valuations, this has been driven by the requirement of clients for explicit assumptions to be made. This could include specific inputs or

assumptions, such as rental growth, risk premium, discount rate, timings and exit point. This is instead of reflecting all risks and rewards in the choice of yield (usually termed an all risks yield in an implicit valuation calculation).

The increased use of DCFs will require some form of further guidance by the RICS in the Red Book or supplementary valuation guidance, together with the commitment of RICS and the valuation profession to enhancing knowledge and application of DCF methodologies in real life scenarios.

The RICS carried out a Call for Views in May 2022 relating to the proposed updates to the Red Book Global and UK National Supplement. Formal consultation is expected in Autumn 2022.

Conclusion

In conclusion, the Levitt, Bichard and Pereira Reviews have called for wide ranging change in the industry, relating to a variety of issues, themes and concerns. We hope that these will be implemented in good time, leading to positive changes for the industry and standards of professional, service and ethics as a whole.

NORWICH CASTLE

TRANSFORMATION

A royal palace reborn

Norfolk Museums Service and Betty Albon

I was lucky enough in July to be invited to accompany Simon Hughes, Director of Property at Norfolk County Council (NCC) and Immediate Past President of ACES, on a site visit of the Norwich Castle project. This article largely uses a project information booklet prepared by the NCC team, led by Project Manager Hannah Jackson. The project will run until 2024 and I'm hoping a later article will feature progress and practical challenges arising during reconstruction. My grateful thanks to the in-house team and contractors Morgan Sindall Group plc.

A brief history of Norwich Castle, 1066 to today

Following the conquest, the Normans demolished at least 98 Anglo Saxon homes within the centre of the expanding town of Norwich to make way for a motte and bailey castle. Subsequently this earthen mound was massively expanded, and a stone keep was constructed on it from c1094 under King William (Rufus) II. Following his death in 1100, it was continued by his brother King Henry I and completed by 1121.

A royal palace

Norwich Castle was designed to be a royal palace rather than a fortification. However, no Norman kings ever lived in it. The only

time Henry I is known to have stayed at Norwich Castle was for Christmas 1121, some 900 years ago.

Norwich Castle Keep was built using limestone shipped from Caen in France, a powerful symbolic action underlining the lavish construction. Originally the ground floor walls were of flint with a lime mortar render, in stark contrast to the white limestone of the Royal Palace's living quarters on the upper level. The principal floor was divided into two sections: on the north side was the Great Hall, and on the south were the royal quarters which comprised a large chamber, bedrooms and a private chapel. Within the outer walls is a walkway where soldiers could patrol the building and servants could access rooms.

The county gaol

From the 14th century the Keep was used as the county gaol, until a new prison, designed by Sir John Soane, was constructed both inside and around its walls in 1792-93. This prison was quickly seen as outdated and difficult to patrol and so the outside block was demolished between 1822 and 1827.

Local architect William Wilkins won the competition (and £100) to design a new prison. Wilkins had a keen interest in archaeology and it is thanks to his efforts that many original features such as the Norman pillar bases in the keep remain to this day.

Between 1834 and 1839, Norwich Castle's dilapidated exterior was refaced



Norwich Castle within the City of Norwich
Unless otherwise stated, images courtesy of Norfolk Museums Service



Top: Internal glass bridge into the keep
Above: glass welcome atrium

Vision images by courtesy of Feilden + Mawson

in Bath stone by architect, John Salvin. His work faithfully replicates the elaborate blank arcading that made Norwich Castle one of the most elaborately decorated of all Norman keeps.

Becoming a museum

In 1883 the county gaol moved to Mousehold Heath in Norwich and work began on converting the building into a museum. Edward Boardman was commissioned to convert the Keep and prison. His work involved ripping out Soane's prison cell block and removing rubble from the lower 2 metres of the Keep. To support the new roof, Boardman built an arcade in Romanesque style down the centre of the keep and installed a balcony at the level of the original Norman principal floor. In 1894 Norwich Castle opened as a museum. It displayed the collections of the earlier Norfolk and Norwich Museum, which had occupied various sites in the city since 1825, alongside collections from benefactors.

It is one of Europe's most important early medieval castles.

Project key changes

With the 'Royal Palace Reborn' project, Norwich Castle enters a new and exciting phase in its 900-year history. The £15m project will transform the Keep's internal spaces by reinstating its medieval floors and rooms, to create a fully accessible and immersive learning space that enables people to explore and experience a Norman royal palace and its stories. It is one of the largest heritage projects of its kind currently underway in the UK.

The key physical changes which the project will deliver are:

- The recreation of the Norman interior spaces of the Keep through reinstating the original principal floor level. This will enable the interpretation of the Keep as it appeared during its heyday under the great Norman kings, including the recreation of the Great Hall, King's chamber and chapel
- The construction of a unique viewing platform at battlement level which will offer stunning views of medieval and present-day Norwich
- The installation of a new lift to ensure that all 5 levels of the Keep –

from basement to battlements – are fully accessible

- The development of a new medieval gallery, designed in partnership with the British Museum, that will showcase national medieval treasures alongside objects from Norfolk's own internationally significant collections. It is the British Museum's first medieval gallery outside London
- The creation of dedicated learning spaces, including a multi-sensory area for Early Years audiences, where they will be encouraged to lead their own creative exploration of life in a medieval castle
- The creation of new visitor and school entrances including a glass atrium, which will afford, for the first time in 50 years, clear views of the Keep's beautiful east façade and Bigod Tower, from inside the Museum
- The development of new visitor facilities including a new café overlooking the atrium with an internal glass bridge into the Keep, and a new shop
- Upgraded toilets which will include a Changing Places facility designed to accommodate visitors who cannot use a standard accessible toilet.

Within the Keep itself, visitors will be able to explore the original layout of the Norman palace, with recreated spaces and the innovative use of projection and digital technology to bring the building to life with sound and colour. The British Museum Medieval Gallery will show beautiful and fascinating objects to explore the lives and stories of people from the period, thematically arranged to understand medieval society – 'Those Who Work', 'Those Who Fight' and 'Those Who Pray'. The Keep will also feature a multi-sensory participation area dedicated to Early Years audiences. Here the youngest visitors will lead their own creative exploration of life in a medieval castle.

Financing the project

While the majority of the funding is in place, an active fundraising campaign is ongoing to ensure the project's ambitions are fully met. The National Lottery Heritage Fund is the principal funder, investing £9.2m.

Other major partners include Archant,



British Museum Medieval Gallery
Vision images by courtesy of Haley Sharpe design

Arts Council England, The British Museum, Costume & Textile Association, East Anglia Art Fund, The Friends of the Norwich Museums, Friends of The Norwich School, Historic England, New Anglia Local Enterprise Partnership, Norfolk County Council, Norwich Business Improvement District, Norwich City Council, University of East Anglia.

In addition, many trusts and foundations have given significant support, as well as commercial sponsors. The 'Keep Giving' public fundraising campaign has also contributed to the overall total, including the very successful 'Adopt an Object Scheme' whereby members of the public can adopt a range of medieval objects which will be included in the new displays in the British Museum Medieval Gallery (www.adoptanobject.co.uk).

Timescale and parties involved

Construction work on the project began in summer 2020 and takes a phased approach which will see the new entrance completed first, culminating in the reopening of the Keep in early 2024.

Cllr. Margaret Dewsbury, cabinet member for communities and partnerships at Norfolk County Council said in August 2020: "This is one of the most exciting times in the 900-year history of the castle. We're so pleased to announce that the construction project has begun. After such a testing time nationally and locally over the past few

months, the 'Norwich Castle: Royal Palace Reborn' project is a cause for optimism and is a major investment in the future of the city and the county. We look forward to seeing the results of this fantastic project which will secure Norwich Castle's future as a jewel in Norfolk's and the UK's heritage crown."

While the Keep itself is closed during the building works, NCC continues to welcome visitors and school groups to the Museum galleries, in line with government guidance regarding C-19.

The project is being delivered by a dedicated team of professionals and volunteers both within Norfolk Museums Service and beyond. A Project Board composed of senior management from the Museums Service, Norfolk County Council and a Trustee from the Norfolk Museum Development Fund meets regularly to oversee progress on the project.

An Academic Advisory Board has met since 2015, to ensure that the project is based on rigorous scholarship. Membership includes professional historians, archaeologists and art historians drawn from the academic, museum and heritage management sector. The University of East Anglia is the project's official Academic Partner.

A dedicated project team of Norfolk Museums Service staff manages all aspects of day-to-day delivery, from liaising with site contractors, to leading on the interpretation, curatorial and administrative aspects of the project.

The project architects are Feilden+Mawson: www.feildenandmawson.com

The project construction partners are Morgan Sindall Group plc: www.morgansindall.com. The company has developed a tailored social value charter for the scheme, dedicated to local investment. The project team will aim to host over 100 apprentice weeks, 5 work experience placements, 2 workless job starts, 2 NVQ starts, and 5 STEM and school engagement sessions.

Area Director for Morgan Sindall Construction, Alister Broadberry said: "We are extremely proud to have secured the Norwich Castle project. It is one of the most prestigious buildings in the East of England and our team is excited to create an environment that will inspire each and every museum visitor. Our purpose is about enriching lives and communities, so the commitments we have made on this project around social value investment are just as important as the project itself. Together with the customer team, we are determined to leave a positive legacy here both in the museum and the community around us."

Site visit July 2022

The project is two years into its 4-year programme. The images taken on the day, by myself and Steve Miller, Director of Culture & Heritage, show the extent of internal deconstruction and the vast



Inside the keep



Hannah Jackson and members of the Project Board

ambition of the project. The team outlined the methods of working in a heritage building, the painstaking recording of the structure, and the not insignificant unanticipated challenges at each step of the way and which needed to be overcome, working closely with Historic England.

One unanticipated delay to the programme was of course C-19. Well under way during my visit were the upgraded toilets and Changing Places facility and, which is one of the many changes designed to allow equality of access for all visitors, together with a drop-in cafe. These were due to be completed, and a new public access opened, this August.

I hope to persuade the Museums team to write a sequel to this article – the problems and how they were overcome.

To keep in touch with progress on the project visit: www.museums.norfolk.gov.uk/RoyalPalaceReborn or Hannah Jackson,

Project Manager, Norfolk Museums Service
hannah.jackson@norfolk.gov.uk

During the project, the team is also aiming to recruit volunteers across a wide range of roles including hosting, social media, marketing and events as part of its commitment to community engagement. One group of volunteers is currently engaged in the wonderful Norwich Friends Tapestry Project, creating a spectacular 18m long tapestry to hang in the new King's Chamber inside the Keep. Made using the original Bayeux stitch, the tapestry will tell the story of the Norman Conquest following the Battle of Hastings, focusing on two East Anglian rebellions against King William the Conqueror's rule.

What impact will it have?

The impact of Norwich Castle: Royal Palace Reborn is set to be wide-ranging and long-lasting. It will:

- Secure the future of the 900-year-old monument and interpret the building in engaging and historically accurate ways
- Transform Norwich Castle into the premier heritage attraction in the East of England, attracting 300,000 visitors per year
- Provide an inspirational learning resource for Norfolk's schools with the capacity to welcome 30,000 school children per year
- Champion a greatly enhanced regional and international profile for Norwich as a major cultural tourism destination
- Have a positive and significant impact for the local economy, creating jobs, providing skills and giving training opportunities.



Some statistics

- £15m raised for the project, including £9.2m from the National Lottery Heritage Fund
- 3700+ people consulted during the project's development phase
- 323 adoptions of medieval objects as of February 2021, raising over £18,500 for the Keep Giving Adopt an Object campaign
- 18,000+ hours contributed as of July 2022 by volunteers working on the Bayeux-inspired The Norwich Friends Tapestry
- 14,400 school children engaged with our medieval-themed learning sessions during the Development phase
- 1,000 objects scheduled for display in the new British Museum Medieval Gallery
- 1:20 scale plan of the Keep interior completed, recording every stone
- 60kg - weight of the heaviest object going in the new displays - a 2.68m long cannon
- 300 working days for the longest object conservation treatment - a 15th Century altarpiece
- 3m x 3.5m the largest overall object going in the new displays, the Bellerophon medieval tapestry



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HEATHER HOSKING, LONDON BRANCH

On-line meeting 13 May

Twelve people attended the meeting, chaired by Neil Simon, including guest presenters Sue Hardy and Nimika Patel, London Estates Delivery Unit (LEDU).

Presentation

Sue and Nimika gave a presentation on the Primary and Community Care estates modelling toolkit, used to support the Integrated Care System (ICS) for the Primary Care Network. It is aligned to the One Public Estate objectives. The tool presents data on a geographic basis and is based on GLA population data. Data can be used to identify the need for additional space and match it against available public sector assets. In some areas, such as NW London, access is available to GP practices.

The toolkit will be useful in integration programmes and include other assets such as schools. It was agreed that the toolkit could be promoted by ACES.

2022 ACES National Conference

Neil Webster reported that the programme is being firmed up on the theme 'Pathway to Sustainable Communities' [Ed – see conference write-up in this issue of ACES' Terrier]. Agents Frank & Brown are liaising with speakers and sponsors. Delegates will be encouraged to do some preparation of their own in order to contribute to workshops.

Members are asked to promote the event to colleagues, non-members and APC candidates.

CPD

There is a free sustainability course on Energy and Carbon in the Built Environment available on <https://www.ucem.ac.uk/energy-and-carbon-in-the-built-environment/>

FACES

Support for people joining the profession. There is a proposal to develop an on-line forum for people working towards qualification. Jill Quinn at RICS believes that there are 300 people in the public

sector who could benefit from support from ACES. It would be useful to have details of how many are in London.

The CIPFA course on asset management has been very successful, but so far has not resulted in new members for ACES.

Exchange of Information

- One member is undertaking a review of the strategic asset management framework, and carbon reduction programme. A question was asked for colleagues' experience of trying to get all unions to work in an open-plan shared space, which is being resisted
- An authority acknowledged difficulties in recruitment, particularly for younger staff, where most existing staff are likely to retire within 10 years. This is a common theme with other authorities. A brokering scheme was suggested, to enable graduates to gain wider experience and to pool resources. It could include private sector firms working with LAs. There is a Kent Partnership arrangement connected to OPE; also a lot of potential within the health sector. Kent could be a trial area. Another member commented that recruitment is difficult at a rural district council for permanent staff at all levels. It was noted that adverts should be clear that roles are for estates surveyors not building surveyors
- One member is looking at Shared Prosperity Fund opportunities, but it is very bureaucratic
- One member asked if colleagues have experience of charging agreements/covenants to repair private roads where the council is the freeholder, but they are not public highway?
- Decarbonisation is a priority at another borough; also a District Energy Network. This is such a priority area that it would be useful to have a members-only area on the ACES website to collect information/strategies/policies

- A question was asked about the valuation approach for appropriation between HRA and General Fund, whether it is EUV or AUV. Does land have to be declared surplus first? EUV was seen as the most regularly used between the HRA and GF
- EPCs – timetable for compliance is approaching and has implications for commercial letting. However, the requirement may be subject to change. It was noted that EPCs are not relevant for buildings which are not heated [Ed – see article on EPCs in this issue of ACES' Terrier]
- The council offices at one county LA remain under-occupied but the costs of running them, particularly energy, are rising. It is also seeking partnerships for running extra care homes; collaboration between LAs and CCGs is still difficult
- Unison policy at one location is now 50% homeworking, following staff agreement. This may be a rare example of a settled policy. The question remains about what to do with vacated buildings, many of which are leasehold
- With relaxation of home working advice by the government, employers do not have a health and safety responsibility for workspace assessments for staff who choose to work at home.

A.O.B

The executive will be considering how to raise attendance at branch meetings. It was agreed that hybrid meetings were not successful, especially as technology may not be reliable at venues. The executive is also to consider whether heads of valuation/estates who are ACES members are content to share information openly through meetings.

The next meeting will be on 8 July 2022 following the visit to developments in Tottenham Hale.

Meeting 8 July 2022

Six people and guest speaker Emily Read attended at The Engine Room, Tottenham Hale. Apologies were made for a poor turnout.

Presentation

Emily gave a presentation on the regeneration work that has taken place in the Tottenham Hale district of Haringey. She explained the council's success in engaging local people in developing the place making approach to regeneration and in keeping them informed and involved as the schemes progressed, particularly in understanding the construction logistics planning. The importance of providing access and promoting the feeling of local ownership of open spaces had also been a key element of the plans.

Emily also explained the portfolio approach to delivery, with targets for the provision of affordable housing spread across sites in the regeneration area, rather than being considered on an individual site basis. The current levels achieved or anticipated to get planning permission within the very short term should result in the provision of 39% affordable housing, 50% of which will be at a social rent.

RICS matters

Chris Rhodes, ACES' President and Neil Webster, Head of Engagement, had met Clement Lau, President of RICS, and had found him very supportive of the public sector membership within RICS. He is proposing to nominate someone in the RICS to take forward the proposals discussed with Chris and Neil. Neil suggested that a meeting could be held

jointly with the Government Property Profession, possibly at RICS HQ, to discuss public sector representation.

There are 6,000 candidates on the RICS qualification pathway, 600 of whom are employed in the public sector. He suggested that making contact with these could be a way of encouraging their managers to join ACES.

There was also discussion about the Richard Review [Ed – see article in this issue of ACES' Terrier], which had identified some serious issues and emphasised the need for the RICS to focus on its membership and on its activities being directed to the public good.

CPD

Future topics to be considered include digital technology and its use in property; the Property Exchange, which is the second iteration of the Property Pledge.

Exchange of information

- One member, who is a board member of a housing association, reported that housing associations are generally not seeking to acquire sites and develop them themselves because of concerns about viability. It is considered unlikely that the rent increase formula of CPI + 1% can continue with inflation looking set to hit 10% shortly, resulting in rents falling in real terms, at a time when building costs are increasing dramatically. Housing associations are only acquiring new units through s106 developer contributions

- A member reported that he had recently attended a conference which had focused on the provision of special educational needs, particularly on how the latest funding stream should be allocated, given the difficulty in predicting future demand. He felt that there is likely to be investment in new special schools and in providing resource spaces in existing schools to meet the profiled needs of different groups in the community
- A council is experiencing significant reductions of up to 20% in its RTB valuations when these are referred to the DV. There are limited grounds on which the DV's reassessment can be challenged. It was suggested that London Branch could contact boroughs in the south of London to see whether they have had the same experience and possibly arrange a meeting with the DV
- Appropriations between HRA and GF at a council were still an issue and that each site was likely to be considered individually
- An office building in southern England converted to residential, with three floors added, had been acquired by a borough council. On removing the cladding, it had been found to have serious structural issues which had to be addressed and which were resulting in delays to the council's housing programme.

JENNIFER SCOTT, SCOTTISH BRANCH

On-line meeting 27 May

17 members attended. John Gahagan chaired the meeting in the absence of Morag Angus. A number of resignations were reported, but equalled by the same number of new member replacements.

Valuation Working Group

A group member provided notes to all attendees. Topics covered included asset valuations and indexation; audit scrutiny; Red book review; timetable for non

domestic rating revaluation (1 April 2023 and 3-yearly thereafter); the valuation of housing; ESG allotments; buildings insurance; non operational property rents; telecoms (Infralink/Pipingford case).

There is a plea from the RICS for more APC assessors.

The next meeting is in August 2022 (TBC).

Asset Management Working Group

Report of meeting of 3 February 2022. The group would like to increase attendance

and would welcome both new attendees (who need not be branch members) and suggestions for future discussion topics. Topics that were covered were social value measurement; suitability assessment; hybrid working; legislation of short-term lets.

A question was raised about environmental matters/best value affecting values.

The next meeting is in June.

Discussion forum

- Common Good properties – there

- was wide ranging discussions including internal lettings for Common Good property to other resources/departments; alienation; consultations on disposal/lettings etc
- Telecomms Code agreements - rent reductions; management fees; Infralink project
- Non operational properties - advised to hold and designate for economic development purposes and not investment/commercial
- IFRS General agreement - there was no pause of professional asset valuations for operational property P&E.

Presentation

A presentation from Gemma Campbell was received on community wealth building and land. There were 22 attendees.

The next meeting will be virtual, on 26 August, with President Chris Rhodes in attendance.

BRIAN PRETTYMAN, EASTERN BRANCH

Eastern Branch continues to have a busy line up of events with monthly virtual catch-up sessions, as well as more formal branch meetings.

The catch-ups usually last an hour to an hour and a half. There isn't a formal agenda and whoever is leading the session tends to prompt open discussion among attendees, by suggesting currently topical issues. Although these meetings started with C-19 and covid recovery, they have now moved on and items currently attracting interest and discussion include recent transactions and market trends, building cost inflation, and climate emergencies and carbon reduction, not to mention how accommodation is being adjusted to reflect new ways of working. This has proved a very successful forum for open discussion about individual experiences and responses to

issues and to compare different approaches.

The sessions are sometimes supplemented by a short presentation and over the summer, we have had some speakers on the opportunities presented by Biodiversity Net Gain and Offsetting, and practical measures to support carbon reduction [Ed – a number of these speakers have subsequently agreed to write articles for ACES' Terrier and appear in this issue]. The September session included a presentation on the very topical Sizewell C supply chain. The sessions regularly have good attendance of between 20–30 participants.

We had our first face to face branch meeting in 2 years at Cambridge Guildhall on 24 June which included a visit from ACES National President Chris Rhodes, and presentations on MEES by Ben Strange,

Mobius Building Consultancy, and the latest REVO survey by Steve Norris of Lambert Smith Hampton: 'How can we deliver the renaissance of our towns, high streets and shopping centres? [Ed – featured in this issue of ACES' Terrier, Steve also speaking at the National Conference]. There was a good turnout, and it was great to see everyone in person.

The next branch meeting will again be at Cambridge Guildhall on 21 October when we will have speakers on aspects of infrastructure, which is currently very relevant to the Eastern branch area, with Sizewell C, offshore energy production and associated power-lines, and major water main and highway schemes all on the horizon or under way. The branch AGM will be in Bury St Edmunds on 2 December, full agenda yet to be confirmed.

DAVID MEE, NORTH WEST BRANCH

Meeting held on 8 July

14 members and guests attended the meeting held at County Hall, Preston.

Workshop programme for 2022

The next APC workshop at Salford University is provisionally scheduled for early September. Also proposed are CPD half day sessions and 2-hour sessions hosted at the university, with free places for ACES members and discounted rates for ACES member's colleagues. Also planned is a seminar on presentation skills aimed at junior staff members, free for 10 delegates, probably in late September.

The success of the Haydock CPD event held in May 2022 was noted.

Staff wellbeing re remote working and service delivery

A number of members commented on the current position:

- Significant covid rates existed again in Tameside and caution was needed
- A member was looking to offload a surplus office building
- Space for a "collaboration" floor had been set up in a county hall; service reviews had strengthened property links
- An enquiry was made about any particular measures to help graduates and junior staff. It was agreed that more monitoring of graduates was essential
- It was suggested that an ACES register of graduates in the North West could disseminate information; also regular presentations for graduates and junior staff may be welcomed.

Items raised

- Are any authorities experiencing difficulties in negotiating acceptable terms for the purchase of access arrangements for development schemes where Network Rail land is involved?
- A member asked about challenges using recruitment agencies. Rates of £50 plus per hour were being asked. This was acknowledged as a common issue. Recruitment agencies being used include Oyster, Vividand and Eden Brown. PH said recruitment was slightly improving in one local authority area, but not on the building services side. The age profile of staff was going up; graduates are not generally on career grades, which is not helpful and one member indicated that he was

trying to get sufficient grades to counter this problem

- A member asked if colleagues value surplus assets on an annual basis. The consensus was that these assets were normally valued annually
- How were authorities coping in the energy crisis? This prompted a general discussion. The related subject of MEES was raised and the need to source a speaker on the topic for the September OGM.

Next meeting – Branch OGM, Friday 30 September 2022 at Kilhey Court Hotel, Standish. The chair made a plea for a good turnout when the ACES National President is attending. She expressed some concern about recent branch attendance numbers. It should be discussed at the next branch executive meeting: ask the members why are they not attending? Has the general move to virtual meetings had an effect? Might a switch from the traditional Friday meeting day be of benefit? Friday is a popular day for taking a day's leave which can lead to staff cover shortages on that day.

Meeting on 30 September (Rachel Kneale)

On 30 September the North West Branch was pleased to welcome the National President Chris Rhodes to its OGM. There

was a particularly high turnout and attendees made use of the opportunity to network – something which has been missing for quite some time.

Chris spoke about the visits that he had made over his Presidential year at which he observed the different approaches taken by branches to meetings. Some, in common with the north west, had returned to fully in person meetings, while others were embracing hybrid meetings and some had found that fully virtual suited them best.

Chris gave details of his north west credentials by giving some background to his family's links to the area and his career path to date. He continued, with his reflections on his presidential conference in Sutton and asked that feedback be provided to allow improvement where appropriate. He gave a great deal of credit to his London branch and officers of ACES for the significant support that he had received during a period of high staff vacancies at Sutton Council.

The meeting continued with a report on the workshop programme for 2022. An APC workshop was held at the University of Salford on 7 September for candidates and their sponsors; about 30 delegates attended. The majority of surveying apprentices attend the day release course on estate management run by Salford and the teaching staff are keen to continue to grow their links with ACES by providing CPD.

The annual CPD day at Haydock Park was discussed to determine whether the venue was still popular with attendees (it was) and whether or not the cost should be increased from its current level which has remained the same for the past 8 years.

A roundtable discussion took place about staff well being and service delivery levels following C-19. A show of hands was taken to see how many days each officer attended the office and there was very few who confirmed that they were doing 5 days, with the majority on the 2-3 day level.

The last part of the meeting was a short presentation by a visiting speaker James McSorley about the changes to the MEES legislation. The meeting had a number of questions for him, both theoretical and practical, and he was able to draw on his great experience which began with qualifying as a plumber and progressed through a number of consultancy roles in energy management. One particularly interesting point was that James did not believe that he had ever seen a genuine 'G' rated property. Many premises, if properly investigated, with their use being taken into account, may have a better score than sometimes is accorded to them by the assessors.

Both speakers were presented with a bottle of Uncle Joe's mint balls which are produced in Wigan, as a reminder of their visit.

ALISON HEXT, HEART OF ENGLAND BRANCH

Meeting on 23 June

HoE was due to hold its branch meeting in Birmingham in person on 23 June for the first time in a couple of years and we were looking forward to meeting ACES President, Chris Rhodes, who was attending. However, this time it was the train strike which thwarted the actual meeting.

We continued to hold the meeting virtually; Chris in his report to the meeting advised he had worked in and around Birmingham for 20 years and had been looking forward to revisiting the area, which had changed since he worked there, but also especially as it would have been just before the Commonwealth Games.

The meeting was preceded by a talk by Guy Mansfield of CBRE from the Bristol office on "Acting as master developer – A role for local authorities or not?" He looked at his work with a local authority client on the acquisition of strategic land holdings and the promotion of the local authority's assets in the development plan review. He talked about the rise of the master developer, the challenges faced by entrants seeking to enter the strategic land arena, the influence partnership models have on this sector, and the role local authorities can play in driving housing delivery.

HoE Chair and Secretary attended the National Conference in Sutton on 15-16

September. It was poignant travelling to Sutton, given the sad passing of HM The Queen the previous week and observing the consequent activity in and around central London.

The conference was a welcome change from virtual meetings/conferences and it was good to talk to ACES members old and new, discussing mutual issues as well as the topics of the conference at break out time.

Next meetings

Branch and AGM 3 November 2022 (to be held in Birmingham)

Branch meeting 2 February 2023 to be hosted by Telford and Wrekin Council

GERRY DEVINE, WELSH BRANCH

President's Visit – May 2022

The Welsh Branch on 18 May welcomed ACES President, Christopher Rhodes, who joined remotely.

In his address, Chris gave a strong message on the importance of ACES for us all and the fact that we can learn from common themes. The President urged all members to continue to review Forum topics regularly and to provide replies and information where possible. Having talked about the forthcoming National Conference, Chris said he was looking forward to the opportunity to come to a proper warm Welsh welcome for the AGM and luncheon in Cardiff on 17 November.

Tony Bamford, ACES' C-19 Liaison Officer and Rating & Valuation Officer, reminded us that Covid has not gone away, saying it will create an issue on rating lists, particularly for office and retail hereditaments.

Geoff Bacon, Group Leader, reported that climate change and back to the office were the main topics of discussion at the last CLAW Asset Management and Estates Group meeting. There was recognition that work pressures are impacting on succession of officers and general attendance at CLAW meetings; an informal discussion took place to awaken and gauge members' interest in stepping up to branch officer roles.

On RICS matters, Sam Rees, Senior Public Affairs Officer, RICS Wales, reported that the new Cardiff RICS office will have agile/hub working space. Sam also provided updates on building safety, the Leaseholder Support Scheme and Retrofit Assessment proposals, Conflict Avoidance Pledge and Process, decarbonisation and retrofitting and the Built Environment Carbon Database. On the RICS-accredited Real Estate proposal, Clive Ball reported on very positive discussions with University of South Wales, with great support from Sam and the RICS and the Welsh ACES network. The aim is that the course will be available from September 2023.

Moving on to Welsh Government (WG) and Ystadau Cymru (YC) matters, Ria Hawkins, WG Land Division, reported similar issues to CLAW regarding succession, but positives with regard to future funding availability and the

YC business plan. On WG skills and training there was some limited funding for sustainability training courses with guidance on applications due out soon. Nigel Thomas advised the Land Release Fund runs over a number of years and referenced a tawl for a Museum of Contemporary Arts, ideally a conversion of an existing building. Nigel and the Chairman agreed to have discussions with Data Cymru representatives about data mapping.

Valuation and estates and asset management discussions included licences and fees for events on council land; progressive agile working contracts at one local authority, enabling around half its staff to become permanent home workers; mapping of woodlands in Wales; and what local authorities were doing in their areas towards achieving net zero carbon.

Chris Brain, ACES' Valuation Coordinator, delivered his customary 2 hours of inimitable CPD with news on finance, asset valuation, asset management, commercialism and climate change. On finance, Chris outlined new borrowing guidance from the Debt Management Office in May 2022 for local authorities. Following the CIPFA/LASAAC consultation on asset valuations, and over 200 responses thereto, Property, Plant and Equipment valuations are NOT to be paused and that the introduction of the revised IFRS16 rules for leases would be deferred, with discretion, for 2 years. Chris also flagged up recent volatility in construction costs, potentially causing material uncertainty in DRC valuations.

A report from the Institute of Welsh Affairs found that community groups in Wales faced more difficulties in accessing land and property assets compared to their counterparts in England and Scotland, and put forward 5 recommendations to improve the situation. Welsh Government had also announced plans to invest £25m in capital funding for school kitchens, as part of its plans to roll out free school meals to all primary school children over next 3 years.

Meanwhile, research has looked at the impact of supply chains on councils' carbon emissions and the value of green spaces using a newly developed

tool (Outdoor Recreation Valuation Tool) as well as from a mental health perspective, especially on more modern developments. Chris then looked at asset management in some depth. He put forward his top 5 local government asset management challenges - failures in delivering it, and where improvements can be made, what can be changed, and employment of a 'Blue Ocean Strategy'.

Late summer meeting – September 2022

Holding our meetings virtually seems to have enabled many more ACES and CLAW people to join in – around 40 logged in for our CAPE (CLAW and ACES Property & Estates) meeting on 7 September.

The Chairman reminded attendees the ACES National AGM and luncheon will be held in Cardiff City Hall on Thursday 17 November, with the Welsh Branch AGM also to be held there before the main event, so urged a strong attendance from Welsh Branch members. Tony Bamford provided updates on C-19 and rating matters, reporting that a domestic rent cap had just been announced in Scotland and asked whether the Welsh Government might follow suit.

A topic raised locally: objections to disposal of public open space (POS) took the place of the ACES Forum slot on the agenda and generated much discussion. While this at first may seem straightforward, it was soon evident it is rather more complex, especially how do local authorities define what is POS? (see <https://historyofpublicspace.uk/history/definitions-and-typologies-of-public-space/>). Another complicating factor was social media – a single objector posting on social media could quickly snowball and cause major issues. Yet another factor was when in the process each LA decided to place the advertisements. Some disposals of POS were to utility companies/statutory undertakers using their statutory powers (one case cited was a company compulsorily acquiring land in a park for a major pumping station causing strong local objections). A disposal could also fall within The Playing Fields

(Community Involvement in Disposal Decisions) (Wales) Regulations 2015, causing further issues and delays, from 6 months to 4 years.

Nigel Thomas, Head of Estates Expert Services at Welsh Government spoke on WG matters. On the Land Release Fund, Nigel reported that there is LRF funding still available this year. There is a debate to be had around funding for transfers of land from the General Fund to HRA.

Ana Harries from Data Cymru provided an update on data gathering, saying that data would be split for operational and non-operational property and would be looking at the size and costs of the estate, maintenance backlog, etc. The Chairman reflected the need for meaningful KPIs; likewise, performance data and measuring CO2 emissions.

One Voice Wales – Lyn Cadwallader, Chief Executive

One Voice Wales is the representative body of town and community councils (T&CCs) in Wales. Over recent years, many T&CCs have taken over responsibility for assets under Community Asset Transfers (CATs). T&CCs do not have the expertise to deal with assets; they need more advice and One Voice Wales is a body to support these smaller councils. They do not understand asset management and do not have the resources to support it. One Voice Wales is about understanding Welsh places, collecting data for the T&CCs to help them understand the issues. Perhaps a review of the CAT policies of all 22 unitary councils in Wales and develop a single CAT policy for Wales would help?

Sustainability and succession were also raised as possible issues, when seemingly well-founded community groups with people of expertise move away. One Voice Wales was there to support T&CCs with succession (of councillors and any staff changes) so it is less of an issue for them, but sustainability (of income to meet costs) is down to the councils. Lyn suggested that assets data should be provided for T&CCs so that informed decisions could be made.

Climate Change – Victoria Camp, WG Energy Service Strategic Lead, SW Wales

The Welsh Government Energy Service is funded by WG to help towards achieving net zero carbon targets. It supports and advises community and public sector organisations in Wales, in promoting energy efficiency and in developing local renewable energy projects to cut carbon emissions and provide cost savings, income generation and wider community benefits. As well as WG departments, local authorities, health boards and trusts, the service can be used free of charge by all public sector bodies.

CPD Session – Chris Brain

After the break Chris spoke on:

- Net Zero carbon journey – the Intergovernmental Panel on Climate Change report was released (https://www.ipcc.ch/report/ar6/wg3/downloads/report/IPCC_AR6_WGIII_Full_Report.pdf) in April 2022 and Chris looked at a series of graphs and diagrams showing the differing rates of growth of greenhouse gas emissions between 2000 and 2019; without immediate and deep emissions reductions across all sectors, limiting global warming to 1.5°C is beyond reach. There was some good news - the unit costs of some forms of renewable energy and of batteries for passenger EVs has fallen and their use has risen and many options are now available to generate cleaner electricity (e.g., wind, solar, bio- and hydro-) offering substantial potential to reduce net global emissions by 2030, though the UN Environment Programme Adaptation Gap Report 2020 found that huge gaps remain in finance for developing countries to bring adaptation projects to the stage where they bring real protection against climate impacts such as droughts, floods and sea-level rise
- Local Area Energy Plans (LAEPs) - Ofgem defines a LAEP as: "what is the preferred combination of technological and system changes we can make to the local energy

system, to decarbonise heat and local transport and realise opportunities for local renewable energy production?". The scope of a LAEP is wide, covering the current energy consumption and associated greenhouse gas emissions, as well as the projected consumption in a defined area to 2050, primarily focussing on the area's built-environment (all categories of domestic, non-domestic, commercial, and industrial buildings) and some aspects of energy used for transportation. Guidance on creating a LAEP - (<https://es.catapult.org.uk/tools-and-labs/our-place-based-net-zero-toolkit/local-area-energy-planning/>). Bridgend is one of 3 successful national pilot studies - Some high-level findings from the Wales & West Utilities report were: heat pumps (in 2015) increased carbon emissions from heating due to the marginal carbon emissions of electricity generation; heat pumps did not save gas consumers any money; the heat networks proposed for Bridgend reduced carbon by 30%, but increased gas demand on the local network (due to the proposed CHP units); 80% of consumers were unable or unwilling to pay.

- Nature recovery – in 2020, political leaders representing 93 countries committed to reversing biodiversity loss by 2030. These commitments are far reaching, requiring transformational change across sectors in the way we protect, value, use and engage with nature. The 5 statutory nature conservation bodies of the UK have come together to identify how the UK can succeed in achieving these commitments, along with ensuring that nature recovery plays its critical role in achieving net zero. Their report, published in September 2021 (<https://jncc.gov.uk/our-role/the-uk/nature-positive-2030/>) draws upon the extensive good practice that exists across the UK to present solutions that can be scaled up to achieve change. The Environment (Wales) Act 2016 introduced

an enhanced biodiversity and resilience of ecosystems duty for public authorities in the exercise of functions in relation to Wales. A Biodiversity Duty Plan is required under s6, that public authorities 'must seek to maintain and enhance biodiversity so far as consistent with the proper exercise of their functions and in so doing promote the resilience of ecosystems'; s 6(7) of the Act requires all public authorities before the end of 2019 and before the end of every third year after 2019, to publish a report on what they have done to comply with the s6 duty. This also links in with the Wellbeing of Future Generations Act, which should now be firmly embedded in all decision making in each authority. Answers to FAQs can be found here: <https://gov.wales/section-6-biodiversity-and-resilienceecosystems-duty-frequently-asked-questions-and-guidance-on-reporting> <https://gov.wales/section-6-biodiversity-andresilience-ecosystems-duty-reporting-guidance>

- Carbon reporting - Climate Action Plans - of the 409 UK local authorities, 92, including 7 from Wales, have yet to adopt a climate action plan. In 2017, the Welsh Government set the ambition of achieving a carbon neutral public

sector by 2030. In March 2019, WG published "Prosperity for All: A Low Carbon Wales" which includes Policy 20: Support the public sector to baseline, monitor and report progress towards carbon neutrality. Version 2 of the WG Net Zero Carbon Reporting Guide was published July 2022. The aim of this guide is to develop a universal set of instructions for use by Welsh public bodies, to estimate baseline emissions, identify priority sources and to monitor progress towards meeting the collective ambition of a carbon neutral public sector by 2030. Key sections of the guide including detailed instructions for data gathering and emission calculations for estate based emission sources before setting out the 13 Net Zero Reporting Principles and methodology involved in calculating the CO₂e ('equivalent'), the single comparable unit for all greenhouse gas emissions including CO₂, methane (CH₄) and nitrous oxide (N₂O)). He then provided a worked example before asking, 'How is that going for you?'

- Energy inflation - Chris looked at forecasts, predictions and estimates of the general rate of inflation issued by the Bank of England and other financial institutions before going on to look at household energy costs and predictions in

the light of the massive rises in wholesale gas prices

- Keeping the lights on - Chris presented us with an Energy Saving Matrix to see what we can all do to save energy that may be an improvement on Boris Johnson's suggestion of "buy a new kettle"! The matrix sections were: Fewer face to face meetings, car journeys, building opening and heating hours; turn off computers when not in use, street and traffic lights at night, heating in corridors/foyers; turn down office heating and hot water temperatures, water pressure in boilers, lighting levels; replace non-LED lighting, desktops with laptops, kettles and water coolers with multi-functioning 'hot and cold' taps, car journeys with public transport/cycling, old appliances with 'A' ratings; install pipe lagging, roof insulation, draughtproofing, solar panels, 'smart' building system; increase radiator bleeds, heating and ventilation checks, building use intensification, communication.

Chris advised colleagues of the launch on Amazon in the Autumn of his new book, "The Property Strategy Handbook – Building a Local Authority Property Strategy in Six Easy Steps". For more info e-mail chris@chrisbrainassociates.com and you may even be in time for a special offer!

Other interest areas



MAJOR SPORTING EVENTS – Success or otherwise?

Bernard White

Bernard is a Retired member of ACES, based in the North East.

Mixed feelings

A recent report submitted to Harrogate Borough Council members on the outturn of the 2019 UCI Road Cycling World Championships based in Harrogate caught my attention, given my interest in the sport. It got me thinking if a major event

should simply be taken at face value, or if every aspect put in the balance before those wishing or aiming to host it, "press the button". And, in addition, are there lessons that could be applied to more general, non-sporting situations.

The timing of the report to the council



came just when there was considerable positive publicity - and rightly so - about the success of and potential legacy arising from both the recent XXII Commonwealth Games in Birmingham and also the 2022 UEFA European Women's Football Championship. One of the positives was obviously in the performance of the host nation, both in the medals table, and as overall tournament winners, respectively. Results, it is said, translates into future support and participation. If true, long may it be so.

Prior to the XXII Commonwealth Games and 2022 UEFA European Women's Football Championship, the 2020 UEFA European Football Championships was one of the last major sporting events involving the UK as a co-host (London and Glasgow). Before that there was the 2019 Cricket World Cup Final and again later that year, the aforementioned UCI Road Cycling World Championships based in Harrogate, held centre stage.

While initially all the events were hailed as a success, background articles available for some of them (and others for similar sports and held in other countries in recent times) make interesting reading and, perhaps sadly, take some of the gloss off the initial claims as to the level of success.

For example, the outturn picture of the UCI Road Cycling World Championships 2017 in Bergen, Norway – as well as several other recent world championships and

other sporting mega events – is one where, to quote a report 'outside third parties or 'agents' come in and sell a local city on all these illusory benefits, while incurring few risks or liabilities themselves. Enthusiastic event promoters and naive local politicians jump at the opportunity and are willing to take unrealistic gambles, hoping to generate local excitement, regional attention and perhaps international accolades. The third party then essentially stands on the side-lines as the host city stumbles along, gradually discovering the real costs and benefits of the event. Even as the real situation and challenges becomes clear, local organisers and politicians may still plunge recklessly ahead, knowing that it will ultimately be the taxpayers left holding the bag.' Sound familiar and not just in a sporting context? If we think hard, most of us have been there at some stage in our working life; I know I have.

Hidden costs?

The report Harrogate Borough Council received into the outcome of the 2019 event (a report delayed by the impact of C-19) arose from an independent study, which concluded the championships resulted in an economic boost to the local economy of £17.8m and was watched by a global television audience of 329m across over 124 countries. It also said 84% of people who came to watch the event were satisfied or very satisfied with it. However, it did not take into account a reported drop in earnings for some local businesses, estimated in some quarters as circa £1m. There was a cost to the council of over £600,000 towards the hosting of the event. In addition, The Stray (a local open area) was used as a Fan-zone, but the heavy rain caused considerable damage. However, the cost of reinstatement of some £52,000 was reduced, following contributions by the organisers, to £25,000, but the area was not available to the public for well over 12 months.

While maybe not as hard hitting as the Bergen report, the report to Harrogate members also highlighted:

- When planning events, appropriate involvement for local organisations and residents must be considered at an early stage
- For large-scale events, relevant local organisations should be represented on the organising body, whatever the make-up of the body

- For large-scale events, engagement should start as soon as possible with all sectors (potentially different formats for each sector)
- For large-scale events, a communication plan should be prioritised and agreed with the event organiser and partners. This should include practical information for all groups impacted by the event (e.g., residents, businesses, visitors and other organisations).

Clearly the report recognised the need, going forward, for transparency - and not just because a part of the cost of a major event invariably involves the taxpayer and the public purse. Again, I would suggest lessons on a wider front.

Lessons

The Tour de France (which everyone has heard of and probably tuned in to watch at some stage) and its counterpart in Italy draw massive crowds, but the finance there is primarily from corporate sponsorship, including TV airtime and media coverage. Also, there is more of an acceptance of disruption to daily life. On the face of it, cycling may not be a good model to use or consider when major sporting or other events are planned. However, the conclusions from the 2017 Bergen event and the report into the one in Harrogate in 2019 could be said to provide some views and lessons and not just of a financial nature, which clearly apply and should be applied to most major sporting events and other events attracting a mass audience.

I have a sporting background and no one was more pleased that me when in 2014 the Tour de France, and then in 2019, the UCI Road Cycling World Championships came to North Yorkshire (both passing the end of my road even!). To me as a cyclist and who has watched "the Worlds" abroad on several occasions, as well as both the Tour de France and the Italian counterpart live, when "the Worlds" were announced as coming to North Yorkshire, cost and the imposition on non-cyclists wasn't a real consideration. However, I have to accept that, taking the 2019 event in particular, while there were many plus points, equally the lack of transparency and effective communications left many feeling excluded, especially with matters like extended periods of road closures and changes to the pattern of everyday life over the 9 days of the event. If I had



been a non-cyclist, I might easily have felt aggrieved, despite the event showcasing the area where I lived.

Major football and cricket events affect those around the particular venues, but not too far beyond, and perhaps the fact that the Commonwealth Games venues were wider than the centre of Birmingham, helped make that event an apparent success. That said, in these cost conscious times, it is clear that when a major event is offered, or even bid for (and that may even extend to bidding for Eurovision 2022; by the way Harrogate has a track record there as it hosted the 1982 event!) considerable thought needs to be given to the wider aspects and not just the potential kudos from staging the event. That might seem an obvious statement, but looking at some of the background articles available, they beg the question that rational thinking and the implications of not wanting to be outbid by a rival, is not always to the fore when the decisions have to be made.

Hopefully when there is more outturn information from the recent XXII Commonwealth Games in Birmingham, and also the 2022 UEFA European Women's Football Championship, it will still show that the impact can be effectively measured and that the benefits, both immediate and those in "legacy" terms, outweigh any adverse findings. A number of the events featured in the XXII Commonwealth Games, seem to be enjoying a positive spin off: women's cricket, diving, triathlon and mountain biking being just a few. Equally, women's football now enjoys wide coverage and is

no longer a minority sport, when just the highlights are shown on some obscure channel at some unearthly hour.

On the horizon, the Rugby League World Cup is to be staged at different venues in England starting in mid-October. It was put back 12 months because of C-19; luckily the offer of government financial support was retained. The event will be for teams from around the world, not just men's, but also women's and disabled (wheelchair) teams. Besides seeing some of the top players, the inclusivity is to be applauded, just as it was with the recent XXII Commonwealth Games. Efforts are being made to promote the event, but despite this - and I hope I am proved wrong - I fear that while there will be a wide armchair fan base, the numbers through the turnstiles at some of the games, maybe a little disappointing.

Looking ahead nearly 12 months, Glasgow has secured the UCI Cycling World Championships. The available information for the event shows two benefits that weren't present in Harrogate. They are the timing of mid-August, and the fact that more disciplines will be in the programme and not just road based ones, as was the case in 2019. Cycling proved very popular when the Commonwealth Games were held in Glasgow back in 2014 and hopefully the timing and more diverse programme will contribute to a successful event, with no short-term issues, but with a long term and lasting legacy.

Although I didn't watch too many events at the XXII Commonwealth Games, I did find the items (both on TV and in the

media) regarding Birmingham and the West Midlands well researched, well presented and of considerable interest. Likewise with the UCI Road Cycling World Championships, the coverage of the area, be it Harrogate itself, or the Dales beyond, was as good as any travelogue. That is an aspect of major events in the UK which is sometimes missed; in the Tour de France and the Italian counterpart, TV presenters have crib sheets so they can comment on landmarks and features show as a stage progresses through an area. As an aside, when Harrogate hosted the 1982 Eurovision Song Contest, the Director of the Conference Centre (the venue) was in Greece on holiday, when the Greek entry was being chosen. Sat in the bar, he watched intently and while not speaking much Greek, he was taken by the fact the nearly every sentence contained the word "Harrogate". He multiplied this up by the number of participating countries and then tried to work out what it would have cost if he had tried to buy that amount of publicity.

Having penned this item, I have to say that I cannot come to a clear decision in my own mind as to the correct balance or weighting that should be applied when a major event is offered, or even bid for. I certainly hope that the upcoming Rugby League World Cup and the UCI Cycling World Championships Glasgow has secured, are a roaring success. Likewise, any other sporting event which is being centred on the UK has my support, especially if it can deliver long-term benefits, not just short-term gains. What I can see though, is that there are lessons from these various sporting events that apply equally to major decisions across the whole working sector and especially in the public sector.

If presented in a sporting context with "it's make your mind up time", I would, in all probability, come down on the side of the kudos and hope the benefits and lasting legacy outweigh any criticism, deserved or otherwise. Maybe it would be different if I had been either a building or quantity surveyor, not a commercial (General Practice) one!! In the wider world, however, decision makers need to be transparent, communicate and utilise lessons learned to assist with future decisions, of that there is no doubt; and it is the feedback from major sporting events which show this to be the case.



Simon qualified as a chartered surveyor in 1980. He started his career in the commercial field, moving to private practice in 1983. In the mid-1990s he joined Great Yarmouth Borough Council and in 2006 moved to Waveney District Council (now East Suffolk Council). He retired in 2018.

MORE MUSINGS

The more you put in the more you get out, Part 2

Simon Eades

I commented at the end of my last article that while I was unemployed, I received advice and support from many colleagues I had met over earlier years, many of whom from during my RICS involvement. At the time I knew I was very lucky to receive this encouragement as I had given up on continuing my RICS involvement, as my principal intention was to secure a new post.

While I was looking for a new job I kept in touch with some friends at Great George Street and was advised that the RICS President would be coming to Norwich in Early March 1996. The President that year was Simon Pott, a land agent who was based in Bury St Edmunds and was previously a member of the East Anglian Branch. We met when I joined the JO Committee some 16 years earlier but over time, Simon had ascended through the ranks of the RICS and was elected President in July 1995. I had always intended to stand down from the Branch Committee in 1996 but my redundancy got in the way, and I stood down in October 1995.

However, shortly after leaving Percy Howes & Co in October 1995 I was asked by the RICS Presidential office if I could assist in arranging Simon's Presidential Branch visit in March 1996.

This was to be the third time that Simon had visited Norwich on official RICS business. He visited the Royal Norfolk Show in June 1994 and was interviewed on Radio Norfolk. In 1995, shortly after his election as President the RICS Press Officer suggested a visit to Norfolk would be helpful. I was asked to assist the RICS Press office and after some initial discussion with both BBC Radio Norfolk and Eastern Counties Newspapers (ECN) the President's office confirmed both appointments and, in addition, arranged a breakfast meeting for local professionals and others.

I joined Simon and his RICS minder/ supporter – the chief PRO Officer – and we all felt both interviews were successful. He was interviewed by the Agricultural Editor and it was interesting to be present while the interview took place. The subsequent headline in the Agricultural section of the Eastern Daily Press was "Warning on new farm tenancy deals."

It was only recently that I found the article. It was written shortly before the creation of farm business tenancies which would allow landlords and tenants complete freedom to negotiate new leases from 1 September 1995, which Simon felt would benefit the industry.

He commented "I think the vast majority will do a short-term operation in order to retain the flexibility." Continuing, he said that "The old idea that landlord and tenant are against each other is terribly old hat. They really ought to be acting in partnership together to see what is the best way to get the most out of the land for each other." My notes at the time suggest that the Agricultural Editor was extremely searching in his questions and Simon was equally frank and forthright in his answers!

Following the interview, I discovered that in a previous job I acted as the selling agent when the Agricultural Editor moved

BUSINESS AND PERSONAL FINANCE 11

Office space idea for homeless



SIMON POTT

Empty office space should be used to house the homeless, said Royal Institute of Chartered Surveyors' president Simon Pott on a visit to Norwich yesterday.

"Apart from Norwich, which is a big local example, I can see people in, say, Swaffham or Dereham, moving back in to live in the property that was once offices," said Mr Pott.

"We say in this country we've got a homelessness problem. What do we mean by a homelessness problem when we've got all sorts of property that's unoccupied? Currently there are 690,000 units

of accommodation empty. Representing a caring profession I say it's time we got it organised.

"People say this couldn't possibly be done because of the cost of conversion but what's the cost of conversion when compared with the cost of new buildings?"

"People will begin to ask why buildings are half empty," he said.

For years the city has been segmented for specific uses such as housing, offices, light industry and heavy industry, said Mr Pott, who added that a lot of this would go in favour of mixed use areas. Looking to the future and the

increasing use of technology in the workplace he said that there would be less reason for people to have to travel to and from an office. While accepting the need for "conferences where you can see the whites of people's eyes," Mr Pott thought that people would increasingly use technology from their own homes.

On the housing market, Mr Pott was cautious about prospects. He could "absolutely guarantee" that there would be no return to the house prices boom of the 1980s but he did see some signs of a greater volume of sales and purchases.

to Norwich some 13 years earlier and brought a house in Norwich. For some reason I remembered the address without any prompting!

After the radio interview - which went equally well - I said goodbye to Simon and his RICS support and they returned to London and I went back to the office.

As I said earlier, it was the RICS Presidential office that asked me to assist in arranging the Presidential Branch visit in March 1996. The Branch Chairman, Tom Carr, senior partner of Percy Howes & Co, had started to put together the plans for the day. He was happy for me to assist and, at no time, was there any difficulty on my part. The Branch Chairman had some ideas for the day, but was happy to leave the discussions with ECN and Radio Norfolk to me.

The day of the visit arrived. I had just started at Great Yarmouth Borough Council and was asked to join the RICS Party at my old office in Norwich. When I got there, I was introduced to the RICS supporter and he greeted me like a long-lost friend. He had stayed the previous night in the Cathedral Close with his parents. I had known him since 1963 when we both started in the same form at School. I knew he worked for the RICS but he had kept his visit to Norwich quiet and we had spoken on another matter only the previous week when he made no reference whatsoever that he was coming to Norwich the following week.

The only difficulty was that Simon was driving up from Bury St Edmunds and had got delayed in the traffic on the A11. The pair of us walked to the BBC studios and waited for him to arrive. At one point, it was suggested that if Simon did not arrive I would have to give the interview! I swallowed and hoped that he would arrive in time.

Simon arrived and went straight on air. He spoke with authority, mentioning his professional involvement in the dualling of the A11 in Suffolk. He hoped that these benefits would come to Norfolk soon. At the time – 1996 - ECN was heavily involved in a campaign to dual the A11 and his comments were publicised in the EDP the following day. It is slightly ironic that today, 2022, the A11 is currently subject to long-term road works and he would have had the same difficulties today!

We walked to ECN headquarters so that Simon could be interviewed by the Business Editor. He had heard the interview on Radio Norfolk and was keen to expand on Simon's thoughts on his delay. However, the principal thrust of the interview discussed the current amount of vacant office accommodation both in Norwich and elsewhere. Simon used the interview to expand his thoughts on possible alternative uses for office accommodation.

He commented that "we say in this country we have got a homeless problem. What do we mean by a homelessness problem when we had got all sorts of property that is unoccupied? Currently [1996] there are 690,000 units of accommodation empty. Representing a caring profession I say that is time that we get this organised."

He suggested that in looking to the future and the increasing use of technology in the workplace, he thought that there would be less reason for people to have to travel to and from an office. While appreciating the need for "conferences where you see the whites of peoples' eyes" there would be an increase in technology allowing people to work from their own homes!!

Reading his thoughts some 25 years later, they seem to have a ring of truth following the past two years and the

changes to the high street that are clearly starting to take place (see press cutting).

I felt that the interview went well. The three of us returned to The Close and Tom Carr took Simon to the Government Consumer Credit Trade Association offices and then to a lunchtime meeting. The dinner that night was very interesting and Tom had arranged a good cast of speakers. I sat on a table with many old colleagues from Norwich Union and had a relaxed evening.

Looking back on these times, some things are absolutely clear while others were cloudy and needed a prompt to remind me. As I said in my last article, my life and professional career were at the cross roads. Life was beginning at 40 – well 41 - as I started employment at Great Yarmouth.

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SELWYN – THE EARLY YEARS

Right person, right place, right time (1966)

Dave Pogson

Dave has kindly written more episodes for Selwyn. I for one have grown quite fond of him over the years, with his believable 'near the knuckle' stories.

For 50 years until retirement Dave practiced as a surveyor in Lancashire and Cumbria, becoming a Fellow of the RICS and working for the Department of the Environment, Lancashire County Council, South Lakeland District Council and the NPS Group. During that time, he wrote articles on surveying topics and work experiences which allowed him to introduce some controversy, humour and the odd bit of fiction. <https://davidlewisogson.wordpress.com>

'The Selwyn Series' and 'Herdwick Tales' that precede 'Selwyn – The Early Years' were written specifically for ACES' Terrier. Each story was a self-contained episode in the life of a council property manager from 2001 to the present day and beyond, as he approached and enjoyed early retirement from the fictional Herdwick District Council. They can still be read in back-issues of ACES' Terrier, starting from 'The Final Vote' in 2017/18 Winter Terrier.

The characters often presented controversial and outspoken opinions on local and central government policy and practice. The stories were fictitious and occasional historical background details may have been changed to fit the chronology. The views expressed were those of the author, not those of ACES. The second series ended just after Selwyn's death from old age in 2036.

'Selwyn – the Early Years' is a supplement to that original series, taking Selwyn back to the start of his career, and the same disclaimer applies. The author offers thanks to former ACES member Martin Haworth (ex-Lancashire County Council) for contributing suggestions to help improve this series.

Selwyn stepped off the main street and pushed his way through the double swing doors into the dark foyer of Shepdale Town Hall. The place was deserted even though it was mid-Monday morning. Very little sunlight penetrated its spacious interior. He let his eyes grow accustomed to the gloom. Ornate stone staircases,

with cast-iron stair rails and smooth wooden bannisters on either side of the foyer, wound their way up to the floor above. An even darker corridor lined with portraits of former councillors stretched away immediately in front of him. He could make out the embossed wording on the brass plaque of the nearest portrait - 'Walter Winstler, Mayor, 1936-1939'. He studied the lacquered oak half-panelling along the entrance walls and the polished-oak parquet flooring and marvelled at the expense and craftsmanship that the Victorians had put into the place. A dark oak sign with gold lettering saying 'Council Chamber' was attached to the nearest face of the corridor wall pointing down that corridor into the inner recesses of the building. He'd visited the Town Hall before to attend Saturday night dances in the Assembly Room upstairs, but he'd never been along that ground floor corridor and he wondered what it was like. As much as he wanted to, he didn't have the nerve to go wandering along it to find out.

Behind him were the rooms on either side of the main entrance that fronted onto Sheepfold Lane. A door to the nearest office, with 'Caretaker' etched into its glass panel, half-opened and a tall man with glasses and brylcreemed hair, wearing a khaki dust coat over his day clothes, leaned out and looked at him. Selwyn must have seemed a bit out-of-place.

'Can I help you lad?'

'I'm looking for the Borough Surveyor?'

The Caretaker nodded towards the door

etched with 'Town Clerk' on it and smiled.
'You want Mr Arthur Croxteth. You'll find him in there. He said he was just popping in to leave a note for the Town Clerk.'

Selwyn coloured up a bit as if he should have known, said 'Thanks,' and went to knock on it.

'Come in.'

Selwyn turned the handle, pushed the door half open and leaned around it without entering. A man aged about mid-40s, wearing a tweed sports coat over a white shirt and tie, was leaning over the desk with his back to the door.'

'Can I help you?'

'I'm looking for the Mr Croxteth, the Borough Surveyor.'

'You're lucky. You've found him. This isn't my office but come in and sit down anyway. If the Town Clerk comes back we may have to shift. What can I do for you?'

He sat down behind the desk. Selwyn took his first ever step inside a council office and sat down opposite him.

It had been an exceptionally wet winter and spring in Herdwick district. Out on the fells the sheep huddled under the lee side of the stone walls to shelter from the driving wind and rain. It had been a poor lambing season. Rainfall high up in the Shepdale Horseshoe had sent torrents racing down its tributaries along the Shepdale Valley until they'd poured into the River Shep, to cascade out into Herdwick Bay. Not all that water made it to the bay. Along the way some of it overflowed onto the lower roads within Shepdale town centre. Three times the town centre had flooded, preventing traffic from passing through it on the main A road north, collapsing the road drains and undermining the tarmac road surfaces. There was a good reason that the old town buildings were built out of limestone and slate. The rains had come to remind everyone of that. Then suddenly in May it had stopped and the sun had come out. June looked set to be a glorious month – a much needed respite to allow the recovery to begin.

Selwyn hadn't been too bothered by the bad weather. He'd been busy studying for his A-levels at Shepdale Grammar School. When he wasn't studying he liked to get out on the fells and just walk. He'd spent plenty of his youth walking the footpaths and fells with his dad. At 16, mainly for his own amusement and as a break from studying, he'd started going

out on his own when his dad was too busy with work. He'd begun to record routes that he followed, making notes about their features, producing pen and ink sketches of the interesting locations and even painting some in watercolours. He took snaps with an elderly Corona Coronet camera and developed and printed black and white photos in the attic of his parents' home which he'd turned into a makeshift darkroom. Now he had quite a collection of photos, notebooks and sketchpads.

One sunny Sunday morning at the beginning of June he set out to walk up the Shepdale Valley, to see what damage the wet spring had caused. He caught a bus as far as he could and alighted when it reached the last settlement where it turned to make the journey back to Shepdale. Then he set out to walk up the rough track leading from the last farm to the first summit in the Shepdale Horseshoe. He'd been this way several times before and knew that he would soon reach Reservoir Cottage. He'd read in the Herdwick Gazette that the cottage used to be occupied by people employed to maintain the adjacent reservoir and the upper reaches of the River Shep. Apparently, that maintenance would continue but with external contractors employed by the Northshire Rivers Board instead. The cottage had become surplus to requirements and Shepdale Municipal Borough Council had recently bought it to use as an outlying base for hiking and climbing by the Council's Parks and Tourism Service, in a joint health and wellbeing initiative with North Herdwick Rural District Council.

As he approached the deserted cottage he noticed that one of the chimney stacks, the one on its far end, had collapsed inwards, knocking a hole in the slate roof. It looked a sorry sight and was no longer weathertight. He pulled his camera from his rucksack and took some snaps.

'My name is Selwyn. I'm at Shepdale Grammar School. All lessons are finished now so I'm off revising until I go back in for my A-level exams. I thought that now might be a good time to come in and see you. I was out walking yesterday up the Shepdale Valley and I passed Reservoir Cottage. I'd read in the paper that the council bought it recently.'

'Yes, that's right. Why does that interest you?'

'I just wanted to report some damage. The recent storms appear to have blown over one of the chimney stacks onto the roof. There's a hole in the slates and it's raining in. The top of the stack is in bits. I picked up a loose piece of the lime-mortar and it crumbled very easily so it looks to have weakened from old age. I just thought that you might want to know about it so that you can get it fixed before it causes more damage.'

'That's very helpful of you. Most people would have just walked past without reporting it.'

'Well, I like old buildings, they're interesting. I don't like to see them in disrepair.'

'Which chimney stack was it, the near or the far one as you approach it from the farm end?'

'The far one. I can show you on a photograph. I developed these last night.'

Selwyn reached into his rucksack, pulled out his notebook filled with sketches and with some photos lodged within the pages. He sifted through the notebook and handed over two of them. Then he placed the open notebook on the edge of Arthur's desk so as not to lose his place among the pages. Arthur studied the photos and then asked:

'Can I keep these?'

'No problem. Are they helpful?'

Very. I can use them to organise making it safe and arrange with our contractors a temporary cover for the hole. This may save me a trip up there. I can also use them to lodge a provisional insurance claim. I can get the stack and roof sorted and then worry about any inside damage to ceilings and decorations later when I have more time. What with all the rain we've had I'm very busy sorting out other flood damage repairs as it is, without taking the best part of a day to go up the valley to inspect this as well. The council hasn't formulated any fixed plans for opening up the cottage for use yet, so it's not spoiling any intentions that it might have.'

'I'm glad to be of help.'

'That looks interesting. Mind if I have a look?' Arthur reached over, took the open note book and thumbed through the maps and notes and sketches. 'How long have you been doing this?'

'About three years, whenever I get the chance to wander up the fells.'

'This is really good work – very detailed ...very accurate ...very artistic. If I didn't know the area already, I reckon

that I could find my way up and down there very safely just by following your instructions. I've never seen anything quite like them before.'

'It's my own system. I do watercolours of the views as well but they're at home.'

'You should have these published. They'd make an excellent guide book. I have a friend at the Herdwick Gazette who might be interested if you'd like me to ask.'

'Well, I've never thought about it. Do you really think so? I've got a lot more stuff like this at home. Can I get back to you on that?'

'Certainly.' Arthur scribbled on a pad, tore off the page and handed it to Selwyn. 'Here's my name and phone number. You might make a bit of money. Help you out at university if you're thinking of going there in September.'

'I haven't decided about uni yet. I've applied and had a couple of provisional offers to take a geography degree, subject to getting the grades at A-level, but I'm not sure if that's what I want to do yet. I can't see geography getting me a job at the end of it unless it's as a teacher, and I don't want to do that. I've got a temporary job loading and unloading wagons and baling fleeces in the Wool Depot at Herdwick Farmers' Cooperative. I'm going to think about what I want to do over the summer while I watch England host the World Cup.'

'Well think about my suggestion for the guide book. Give me a ring if you're interested. And thanks again for reporting the damage up at Reservoir Cottage.'

Selwyn's next visit to the town hall resulted in the town hall caretaker redirecting him outside and down the yard at the side. There he found a small, 3-storey stone-built office block wedged between the rear of the town hall and the former terraced town houses that stretched along the road running down the opposite side of the town hall from the yard. In the gap behind the offices was a cleared open, pot-holed gravel surface which served as the car park to the offices. He entered a small reception space. A young woman directed him through a side door and led him to Arthur's office. Selwyn noted the desks and drawing boards and filing cabinets. People were busy chatting on telephones or studying papers. He liked the buzz of activity as he passed through.

'Thanks for coming. Please take a seat.'

Arthur indicated the chair opposite his desk. Selwyn placed his rucksack on the floor by the chair and sat down.

'Coffee?'

'Please.'

The receptionist was looking at Selwyn. 'Milk and sugar?'

He nodded and she left, closing the door behind her.

'How are you, Selwyn?'

'Just a bit nervous and excited after your phone call.'

'That's understandable but don't be. We might look a bit rough in here but we don't bite.'

Selwyn laughed and relaxed a bit.

'Right, Selwyn, first things first. You said on the phone that you're interested in publishing your maps and notes and sketches of your fell-walks as a series of guide books. I've fixed up for you to see my friend at the Herdwick Gazette. We can take a walk over there later if that's convenient. He'll tell you all about that once he's seen them.'

'That'll be fine. Thanks.'

'Before that I have a proposition for you, if you're interested. Have you thought any more about going to uni?'

'Not really. The exams seem to be going fine. But, if anything I'd rather find a practical career, although I've not fixed on anything.'

'Well consider this. How do you fancy a career as a surveyor? I think that with your interest in geography, your obvious eye for detail, your skill at recording maps and routes and landscape and buildings, that you have a natural aptitude for what we do here in the Borough Surveyor's Department. You know the local area. I already know that you're a responsible sort of lad from reporting the damage at Reservoir Cottage. And you seem to know a bit about building defects. Do you think that might be of interest?'

'Do you mean a job here, working for you?'

'Yes. I've been short-handed for a while and the storms have caused even more work and made things worse. I can't persuade the Town Clerk to take on the expense of anyone qualified but he has agreed to a trainee surveyor post to assist me with the estate management side of the department. The money's not great to start with but it would be on an annual rising scale. You could exist on it if you continued to live with your parents. The council will pay your expenses to take a correspondence course in your

own time with the Royal Institution of Chartered Surveyors, supplemented with evening classes at Lanchester College of Technology, to get your qualification. You could also study if we ever get any quiet times in the office. I'd suggest taking the General Surveying option as the best fit for what I need you for. It would take you 3 years with exams, combined with a minimum of 2 years on-the-job training. If you qualify straight off then, as long as you're over 21 by then, you could become a chartered surveyor.'

'What would I be doing?'

'Anything relating to Shepdale MBC property. I'm a Building Surveyor but in the Surveying Department we tend to do a bit of everything. I'd be looking for you to specialise in estate management. Buying, selling, leasing, managing repairs and maintenance, accounting for running costs. As you progress, you might be dealing with contractors, building alterations and improvements. Small jobs at first and gradually working your way in. Generally, we sort out problems with property to keep the council functioning. It's a mix of office work and outside work, travelling around the area to inspect land and buildings, meeting with people, preparing reports, valuing, negotiating and agreeing deals, etc.'

'Would I be based here, in this office, with a desk and a chair?'

'Yes, and a telephone. Just outside that door.'

'When would you want me to start?'

Arthur looked at his calendar.

'I'll need a reference from your headmaster. I assume that's going to be straightforward. First you've got to finish your exams and wait for your A-levels results. You need to get a minimum of 2 passes to get on the RICS correspondence course by the way. Then, presumably, you'd have to work a week's notice on your summer job at HFC. How does the first Monday in September sound to you?'

'Don't you have to advertise the vacancy?'

'No. Charles Bowstead, the Town Clerk, trusts my judgement. I have authority to appoint anyone that I think fit. You're just the right person for us.'

'Well then, it seems like I'm the right person in the right place at the right time. Thanks.'

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