



Affordable Consultancy Services 2022

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Ethical Property Foundation

Building knowledge & confidence

TAILORED LEARNING - WORKSHOPS & WEBINARS

Q: Are you keen to improve your property management for long term sustainability?

We deliver expert, tailored workshops and webinars to:

- grant funders
- social lenders
- local authorities
- individual charities &
- social enterprises.



Current topics include:

- Charities & Social Enterprises: How to be a Good Landlord & Create Sustainable Income
- Statutory Compliance: Charity Property & The Law
- Strategic Property Decision Making for Trustees
- How to Read & Negotiate a Lease
- Running Green Energy-Efficient Premises to Cut Costs & Your Carbon Footprint
- How to Write a Property Strategy to Maximise Income & Good Management
- Basic Everyday Property Management
- How to Manage a Successful Community Asset Transfer

Each webinar or workshop is run by two experienced property professionals for up to 50 participants, who will receive a comprehensive information pack via email including guidance, templates, and a jargon buster.

We also offer free follow up property advice, which may include referrals to EPF's Register of solicitors or surveyors.



Prices for workshops are available at request and all are tailored to Client requirements.

CONTACT US

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Chief Executive

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with Tailored Learning in the subject line
for further information.



REDUCE YOUR ENERGY BILLS

Q: Does your charity face soaring energy bills?

Q: Keen to reduce your carbon footprint?

Q: Need to have a level E EPC by 2023 to let your property out?

Cut your bills and ensure property improvements are cost effective.

Commission an EPC inspection TODAY!

This service will:

- include a site visit from an EPC Assessor
- provide a jargon-free report
- shrink your energy bills
- reduce your carbon footprint
- provide clear, concise, and cost-effective advice
- attract funders, banks, and social lenders.



CONTACT US

Simon Taylor FRICS

Head of Property Advisory

simon.taylor@ethicalproperty.org.uk
to discuss how our consultancy can be tailored to meet your needs.



EXITING YOUR CHARITY PROPERTY SUCCESSFULLY

This tailored service is for any charity or social enterprise looking to sell existing buildings safely, sustainably, and legally.

Working with your own experienced Property Adviser you and your team will understand:

- what the charity owns and on what basis you own it
- why you want to sell - the pros & cons
- the process your charity must follow
- who you ask for help
- risk and how to manage & mitigate risks at every stage
- legal Compliance – what trustees need to know
- the surveyor's valuation required when disposing of property for the Charities Act
- the questions trustees must ask.

This service includes:

- a free diagnostic review
- a site visit
- a jargon free report helping you and your charity to chart the way forward to market.



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PROPERTY STRATEGY FOR HYBRID WORKING - THE NEW NORMAL

Q: Is your property fit for purpose?

Q: Where do you start with long-term planning?

Q: What will it cost you?



The pandemic has created serious property issues for many charities and social enterprises.

Many staff and volunteers now expect to work at least part of the week at home and so the Ethical Property Foundation is here to help you reappraise your property needs long term and maximise financial sustainability in uncertain times.

An Ethical Property Foundation Associate Property Adviser will:

- support your organisation's trustees and managers to adapt and plan for the future.
- support you to understand and mitigate risk, placing your premises at the heart of your charity's success
- ensure your community can work safely and enjoyably.

This service includes:

- full diagnostic of your current concerns and long-term issues
- a site visit



- an easy-to-understand strategy report with choices and options to ensure that you and your trustees have every decision covered.

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PROPERTY CONDITION REPORT SERVICE

A Property Condition Report is a vital document for every charity taking on a lease or moving out at the end of the lease.

The Property Condition Report service will support your charity to:

- maintain your premises, to a prescribed standard, during the lease



- return the premises to the landlord in the same condition as when the keys were first handed over
- prove the initial condition and so to prevent large bills from the landlord
- carry out repair obligations within the lease prior to landlord inspections.

When purchasing this service at the beginning of a lease this service will:

- act as a formal Schedule of Condition when attached to a lease
- support trustees to challenge any landlord's claim by showing the pre-existing defects and condition of the property
- save the organisation a large and unbudgeted expense.

This service includes:

- a site visit from one of our Associate Property Advisers who will talk you through the pitfalls
- a full written and photographic record:
 - which safeguards your charity from huge, unexpected bills
 - saves stress and worry



- puts you and your charity in control of your property journey
- shows your landlord you mean business.

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FUTURE PLANNING: THE PROPERTY OPTIONS REPORT

This service gives you the information and decision-making tools to work out your property options for your charity.

The Property Options service includes:

- a site visit to gather information / data and to discuss what you are aiming to achieve
- a detailed Property Options Report



- including:
 - your statement of your aims
 - an overview of the range of options available
 - a detailed description of each option
 - an analysis explaining the likely risks and benefits
 - a timetable for each option, showing those that can be achieved quickly and those which will take relatively longer to complete
 - a conclusion of our findings
 - a schedule of our recommendations
 - a next steps section – where to go for you to discuss with your trustees, employees, volunteers, service users and stakeholders
 - plans and layout drawings (where provided by the client)
 - signposting to other property services.

Whether you rent or own, or whether you are looking to upsize or downsize, our Property Advisers will give you a clear guide on the choices available in plain



English, with practical step-by-step guidance on how to achieve the best result for your organisation.

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