

# Land and Asset Transfer

## Shared Learning Seminar



These are the ideas and challenges raised by delegates during the seminar. We encourage you to get in touch with delegates if you want to find out more about their idea or can help them with their challenge.

### 1. Valuation

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### 3. Strategy and Community Councils

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## Valuation – ideas

| Idea   | Delegate  |
|--|---|
| Some specific sessions e.g. disposals  | Helen Jones<br>Bridgend County Borough Council<br><a href="mailto:Helen.Jones1@bridgend.gov.uk">Helen.Jones1@bridgend.gov.uk</a>                  |
| <ul style="list-style-type: none"> <li>We review / have reviewed portfolio to release surplus assets and continue to review</li> <li>Sell surplus by public auction</li> <li>Look for development potential in owned portfolio and other adjoining site</li> <li>Have access to ePims</li> <li>Speak to other authorities</li> </ul> | Cerys Halford<br>Bridgend County Borough Council<br><a href="mailto:cerys.halford@bridgend.gov.uk">cerys.halford@bridgend.gov.uk</a>              |
| For viability analysis useful to show impact of affordable housing variances and more mix, therefore useful to know what % was agreed on other sites   | Nick Corrigan<br>Vale of Glamorgan Council<br><a href="mailto:nicorrigan@valeofglamorgan.gov.uk">nicorrigan@valeofglamorgan.gov.uk</a>            |
| Working with Developers (Registered Social Landlords) to ensure Council policies on housing supply are being met   | Louise Horner   |
| <ul style="list-style-type: none"> <li>Access to information</li> <li>Working within time limit</li> <li>Good interaction and communication</li> </ul>   | David Watson<br>City and County of Swansea<br><a href="mailto:David.Watson@swansea.gov.uk">David.Watson@swansea.gov.uk</a>                        |
| <ul style="list-style-type: none"> <li>Planned preventative maintenance of sites</li> <li>Developing service level agreement for property support</li> </ul>   | Julian Atkins<br>Brecon Beacons National Park Authority<br><a href="mailto:Julian.Atkins@beacons-mpa.gov.uk">Julian.Atkins@beacons-mpa.gov.uk</a> |
| Early engagement of District Valuation Service on Asset Transfers and Land Purchases   | Kirk Riordan<br>Cwm Taf University Health Board<br><a href="mailto:kirk.riordan@wales.nhs.uk">kirk.riordan@wales.nhs.uk</a>                       |
| We've had a good experience of using the land transfer protocol to provide joint instructions for an independent valuation with other public bodies which has saved on cost of fees and sped up the process  | Katie Crane-Davis<br>Carmarthenshire County Council<br><a href="mailto:KMCrane@carmarthenshire.gov.uk">KMCrane@carmarthenshire.gov.uk</a>         |
| Selling sites off market to Registered Social Landlords (District Valuer Valuation) can save fees/costs i.e. marketing   | Helen Jones<br>Bridgend County Borough Council<br><a href="mailto:Helen.Jones1@bridgend.gov.uk">Helen.Jones1@bridgend.gov.uk</a>                  |
| Very good joint working between planning, regeneration and property to maximise land values on disposals   | Satwant Pryce<br>Bridgend County Borough Council<br><a href="mailto:Jayne.Jones@bridgend.gov.uk">Jayne.Jones@bridgend.gov.uk</a>                  |

## Valuation – challenges

| Challenge  | Delegate  |
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| What is a reasonable developers profit?  | David Watson<br>City and County of Swansea<br><a href="mailto:David.Watson@swansea.gov.uk">David.Watson@swansea.gov.uk</a>                          |
| Ability to challenge District Valuation Service when making assumptions / corps                                  | Nick Corrigan<br>Vale of Glamorgan Council<br><a href="mailto:nicorrigan@valeofglamorgan.gov.uk">nicorrigan@valeofglamorgan.gov.uk</a>              |
| Not robust enough on challenging build costs and abnormal ground condition costs supplied by proposed developers | Louise Horner<br>Blaenau Gwent County Borough Council<br><a href="mailto:Louise.Horner@blaenau-gwent.gov.uk">Louise.Horner@blaenau-gwent.gov.uk</a> |
| Would benefit from basic training in valuation for planning and regeneration officers                            | Bridgend County Borough Council   |

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| Understaffed  | Cerys Halford<br>Bridgend County Borough Council<br><a href="mailto:cerys.halford@bridgend.gov.uk">cerys.halford@bridgend.gov.uk</a>              |
| Capacity for reviewing assets and developing our information base (legacy holdings)   | Julian Atkins<br>Brecon Beacons National Park Authority<br><a href="mailto:Julian.Atkins@beacons-npa.gov.uk">Julian.Atkins@beacons-npa.gov.uk</a> |
| How do you review submitted build cost?   | David Watson<br>City and County of Swansea<br><a href="mailto:David.Watson@swansea.gov.uk">David.Watson@swansea.gov.uk</a>                        |
| Often pressure to sell for less than market value to registered social landlord. Council would prefer to take to the market and realise best value through bids | Helen Jones<br>Bridgend County Borough Council<br><a href="mailto:Helen.Jones1@bridgend.gov.uk">Helen.Jones1@bridgend.gov.uk</a>                  |
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## Asset Review – Ideas

| Idea  | Delegate   |
|---|--|
| Market property above valuation   | Janet Hilton<br>Ministry of Justice<br><a href="mailto:janet.hilton@justice.gsi.gov.uk">janet.hilton@justice.gsi.gov.uk</a>  |
| Clear procedures and protocols to underpin process  | Mark Howland<br>Blaenau Gwent County Borough Council<br><a href="mailto:mark.howland@blaenau-gwent.gov.uk">mark.howland@blaenau-gwent.gov.uk</a>                   |
| <ul style="list-style-type: none"> <li>Found it helpful to break the process down into manageable phases e.g. by property type or service type or location or activity phase</li> <li>There are undoubtedly capital, revenue and service benefits to be achieved through an asset review process</li> </ul> | Steve Dinnick<br>Rhondda Cynon Taff County Borough Council<br><a href="mailto:Steve.Dinnick@rhondda-cynon-taff.gov.uk">Steve.Dinnick@rhondda-cynon-taff.gov.uk</a> |
| Leisure trust working well to date. Existing skill sets going with the assets have really helped – continuing support needed  | Torfaen County Borough Council   |
| Good connections with Local Service Board i.e. Police – property requirements   | Andrew Homer<br>Torfaen County Borough Council<br><a href="mailto:3orfae.homer@torfaen.gov.uk">3orfae.homer@torfaen.gov.uk</a>                                     |
| I try to present the 'reality' of the situation faced by smaller community councils at public events where appropriate  | Liz Dutch<br>Llansteffan and Llanybri Community Council<br><a href="mailto:liz.dutch@googlemail.com">liz.dutch@googlemail.com</a>                                  |
| Review of assets brings with it opportunity to understand portfolio and realise inefficiency and waste, but maximise use and profitability  | Cerys Halford<br>Bridgend County Borough Council<br><a href="mailto:cerys.halford@bridgend.gov.uk">cerys.halford@bridgend.gov.uk</a>                               |
| Cross-public sector assets working group  | Bridgend County Borough Council  |
| Invest to Save money made available for Vale to further asset review process to complete the remainder of our portfolio   | Lorna Cross<br>Vale of Glamorgan Council<br><a href="mailto:Lcross@valeofglamorgan.gov.uk">Lcross@valeofglamorgan.gov.uk</a>                                       |
| Improving asset data to improve opportunities to identify: <ul style="list-style-type: none"> <li>Co-location</li> <li>Collaboration</li> <li>Surplus assets</li> </ul>   | Nick Corrigan<br>Vale of Glamorgan Council<br><a href="mailto:nicorrigan@valeofglamorgan.gov.uk">nicorrigan@valeofglamorgan.gov.uk</a>                             |
| <ul style="list-style-type: none"> <li>Collaboration between colleges and council with occupying / sharing space within property (licences)</li> <li>Using District Valuer Services to purchase land between council and college</li> </ul>   | Paul Davies<br>Coleg Y Cymoedd<br><a href="mailto:Paul.Davies@cymoedd.ac.uk">Paul.Davies@cymoedd.ac.uk</a>   |
| Developing asset management strategy across colleges (FE/HE)  | Paul Davies  |

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| sector)  | Coleg Y Cymoedd<br><a href="mailto:Paul.Davies@cymoedd.ac.uk">Paul.Davies@cymoedd.ac.uk</a>  |
| <ul style="list-style-type: none"> <li>Facilities Management Costs Analysis to look at the sustainability of our buildings closure / disposal etc.</li> <li>Courts Estate Rationalisation Programme</li> <li>Investment in newer, larger multi-functional courts</li> <li>Agreement with Welsh Government on Carmarthen</li> </ul> | Matthew Fox<br>Ministry of Justice<br>matthew.fox@justice.gsi.gov.uk   |
| Lessons learned from delivery of community asset transfer programme  | Tina Cottrell<br>Big Lottery Fund<br><a href="mailto:tina.cottrell@biglotteryfund.org.uk">tina.cottrell@biglotteryfund.org.uk</a>          |
| <ul style="list-style-type: none"> <li>Identification of surplus estate</li> <li>Working with partner organisations</li> <li>- Cardiff / Vale Local Service Board</li> <li>- Localities</li> </ul>   | Jonathan Nettleton<br>University Hospital of Wales<br><a href="mailto:Jonathan.Nettleton@wales.nhs.uk">Jonathan.Nettleton@wales.nhs.uk</a> |
| <ul style="list-style-type: none"> <li>Asset reviews</li> <li>Active disposal programme</li> <li>Operational reviews i.e. non-operational portfolio</li> <li>Higher level support and understanding of portfolio</li> </ul>  | Helen Jones<br>Bridgend County Borough Council<br>Helen.Jones1@bridgend.gov.uk   |
| <ul style="list-style-type: none"> <li>Partner approach to TIC service delivery in Abergavenny</li> <li>Working with graziers to access Glastir funding to manage NPA-owned commons</li> </ul>   | Julian Atkins<br>Brecon Beacons National Park Authority<br>Julian.Atkins@beacons-npa.gov.uk  |
| Development of peer group benchmarking and analysis  | Chris Cowburn<br>Higher Education Funding Council for Wales<br>chris.cowburn@hefcw.ac.uk   |
| <ul style="list-style-type: none"> <li>Asset review</li> <li>Asset transfers</li> <li>Partnership Working</li> <li>Joint use of assets</li> </ul>  | Jonathan Fearn<br>Carmarthenshire County Council<br>JFearn@carmarthenshire.gov.uk  |
| Office rationalisation   | Simon Brennan<br>Neath Port Talbot County Borough Council<br>s.brennan@neath-porttalbot.gov.uk   |
| <ul style="list-style-type: none"> <li>Currently embracing land transfer protocol. 2 instructions for District Valuers in past month</li> <li>Office rationalisation project approaching the end</li> </ul>  | Steve Watkins<br>Cardiff Council<br>SWatkins@cardiff.gov.uk  |

## Asset Review – Challenges

| Challenge  | Delegate   |
|--|--|
| <ul style="list-style-type: none"> <li>Disjointed approach – parks, HRA, Non-operational, office</li> <li>No real corporate or member buy-in</li> <li>Corporate land and property holding. If only!</li> </ul> | Steve Watkins<br>Cardiff Council<br>SWatkins@cardiff.gov.uk                              |
| Multiple funding sources. Long term and extended funding programmes – delays. Uncertainty over reorganisation leading to 'silo' mentality again  | Jonathan Fearn<br>Carmarthenshire County Council<br>JFearn@carmarthenshire.gov.uk        |
| <ul style="list-style-type: none"> <li>Disparity between approaches from different public sector organisations on community asset transfer</li> <li>Length of asset transfer process</li> </ul>                | Tina Cottrell<br>Big Lottery Fund<br>tina.cottrell@biglotteryfund.org.uk                 |
| <ul style="list-style-type: none"> <li>Managing the relationship between strategic planning and the estate</li> <li>Assessing changes in approach to provision</li> </ul>                                      | Chris Cowburn<br>Higher Education Funding Council for Wales<br>chris.cowburn@hefcw.ac.uk |
| <ul style="list-style-type: none"> <li>Resources</li> <li>Political pressures</li> <li>Continuous review (difficult due to resources)</li> </ul>   | Helen Jones<br>Bridgend County Borough Council<br>Helen.Jones1@bridgend.gov.uk           |

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|---|--|
| <ul style="list-style-type: none"> <li>Finding difficult to drive forward matters</li> </ul>  |  |
| <ul style="list-style-type: none"> <li>Office accommodation now at saturation point</li> <li>Difficulties in funding less sexy or speculative property projects (must return sales incomes &gt; £500k to Welsh Government)</li> </ul> | Jonathan Nettleton<br>University Hospital of Wales<br><a href="mailto:Jonathan.Nettleton@wales.nhs.uk">Jonathan.Nettleton@wales.nhs.uk</a>       |
| <ul style="list-style-type: none"> <li>Centrally led i.e. London / National Government – no autonomy</li> <li>Public / Minister / Councilor opposition to any rationalisation or closure</li> </ul>                                   | Matthew Fox<br>Ministry of Justice<br>matthew.fox@justice.gsi.gov.uk   |
| Integration of localised asset management strategy with emerging national agenda  | Simon Brennan<br>Neath Port Talbot County Borough Council<br>s.brennan@neath-porttalbot.gov.uk   |
| How to develop sound assessment management approaches in a small special purpose authority focussed on environmental protection   | Julian Atkins<br>Brecon Beacons National Park Authority<br>Julian.Atkins@beacons-npa.gov.uk  |
| National political and changing will to take action on court closures and mergers   | Janet Hilton<br>Ministry of Justice<br>janet.hilton@justice.gsi.gov.uk   |
| Consultation limited – members agreeing policy and then not liking outcomes   | Blaenau Gwent County Borough Council<br>Louise Horner<br>Louise.Horner@blaenau-gwent.gov.uk<br>Mark Howland<br>mark.howland@blaenau-gwent.gov.uk |
| Have collaborative discussion / opportunities stalled following the Williams report?  | Lorna Cross<br>Vale of Glamorgan Council<br>LCross@valeofglamorgan.gov.uk  |
| We need to continue to challenge our use of assets in order to be efficient and have an optimised portfolio   | Nick Corrigan<br>Vale of Glamorgan Council<br><a href="mailto:nicorrigan@valeofglamorgan.gov.uk">nicorrigan@valeofglamorgan.gov.uk</a>           |
| <ol style="list-style-type: none"> <li>Engagement from service colleague</li> <li>Capacity – asset review is a resource intensive process</li> <li>Sheer complexity of reconciling aspects: property; service; political</li> </ol>   | Steve Dinnick<br>Rhondda Cynon Taff County Borough Council<br>Steve.Dinnick@rhondda-cynon-taff.gov.uk  |
| Review of assets should be continued / be regular and information / database up to date   | Cerys Halford<br>Bridgend County Borough Council<br>cerys.halford@bridgend.gov.uk  |
| <ul style="list-style-type: none"> <li>Issues of lack of existing local protocols</li> <li>Problems of asset transfer driven by local authority becoming adversarial – short lead-in times problematic</li> </ul>                     | Torfaen County Borough Council   |
| Raising capital and revenue expenditure to maintain non-income generating assets in tourist villages e.g. beach playground on Wales Coast Path  | Liz Dutch<br>Llansteffan and Llanybri Community Council<br>liz.dutch@googlemail.com  |

## Strategy and Community Councils - ideas

| Idea                                       | Delegate  |
|--|---|
| Further information on Cornwall experience | Stephen Morgan<br>Carmarthenshire County Council<br>SMMorgan@carmarthenshire.gov.uk |

## Strategy and Community Councils – challenges

| Challenge   | Delegate  |
|---|---|
| <p>What is the primary purpose of asset transfer? Are we just pushing costs around the different levels of public bodies' expenditure? Is this part of a wider political debate on the delivery of local public services?</p>   | <p>Simon Brennan<br/>Neath Port Talbot County Borough Council<br/>s.brennan@neath-porttalbot.gov.uk</p> |
| <p>Should estates surveyors lead on the Community Asset Transfer process? There are many HR, TUPE, Financial Issues where we don't have expertise yet we are expected to co-ordinate and process the application from start to finish.</p>  | <p>Steve Watkins<br/>Cardiff Council<br/>SWatkins@cardiff.gov.uk</p>                                    |
| <p>Some idea of the length of time the asset transfer process takes within local authorities, particularly:</p> <ol style="list-style-type: none"> <li>1. Length of time process takes from the 'request' to transfer received from external organisation to obtaining council agreement to transfer.</li> <li>2. Finalising transfer in terms of legal requirements</li> </ol> | <p>Tina Cottrell<br/>Big Lottery Fund<br/>tina.cottrell@biglotteryfund.org.uk</p>                       |
| <ul style="list-style-type: none"> <li>• Need for a form of vetting and monitoring system to ensure community benefits</li> <li>• Opportunities for the education and training of local communities (Further Education / Higher Education sector)</li> </ul>  | <p>Paul Davies<br/>Coleg Y Cymoedd<br/>Paul.Davies@cymoedd.ac.uk</p>                                    |
| <ul style="list-style-type: none"> <li>• Management skills</li> <li>• Funding</li> <li>• Community Councils need more support and full time staff – how to fund</li> </ul>  | <p>David Watson<br/>City and County of Swansea<br/>David.Watson@swansea.gov.uk</p>                      |