

Background information

You occupy property or you may be looking to do so. You may already own it or rent it, but which is best and where are the bear traps?

How your charity uses and manages its property plays a vital role in your business and financial planning. Get it right and you have a pleasant workplace and motivated staff, volunteers and service users. This is where we come in to help you get it right, first time. Helping you to help yourself.

The **Ethical Property Foundation (EPF)** is a registered charity and a long standing referral partner to the Charity Commission for land & property advice.

Since 2004 the Ethical Property Foundation has provided property support and education to thousands of charities across the United Kingdom, both online and through tailored support, helping them to rent, buy, or manage their premises. All our property advisers are qualified Chartered Surveyors, DBS checked and fully insured.

Offer under Enhance

We provide up to 6 days of consultancy support

Our support is designed around you and your organisation.

This allows us to discuss with you, what your property needs are and how best we provide that support, so that we leave you in a better place than when we started. We aim to help you think about your property as part of your short and long-term strategic business & financial planning decisions. Examples of the areas of support we can offer are:

- **Future Planning Advice** Helping you to decide your property options alongside your overall business strategy
- **Moving On** Exiting Advice - how to sell existing buildings, or end an existing lease, safely, sustainably & legally
- **Property Strategy for Hybrid Working** Help to reappraise your property needs for the long-term and maximise financial sustainability
- **Cut Your Energy Bills Audit** Guidance on reducing your energy bills with an additional option for an Energy Performance Certificate (EPC)
- **Property Condition Report** Gives you a snapshot of your property, to assist with the maintenance of your buildings

and comply with your legal obligations. The Report can also act as a 'Schedule of Condition' if attached to a new lease

When might the Provider be the most appropriate solution for the charity?

- If you want the confidence and knowledge to make good property spending decisions.
- If your charity owns or rents property and is seeking to ensure it delivers sustainably for your staff, volunteers, clients and community long-term.
- If you are looking to ensure your premises are fully incorporated into your financial and business planning.
- If you are looking to minimise your energy costs and reduce your carbon footprint.

Please note

EPF **cannot** not provide:

- Legal advice
- Financial advice
- Property valuations
- Structural survey reports

Input needed from the charity

In addition to your time to engage with the support and follow-up on actions you will also need to share some key documents with our consultants. Our support will usually involve the following:

- *Initial fact-finding diagnostic conversations.*

This helps us listen to what it is you want to achieve, from all parts of your organisation.

- *Site visits to understand your charity's physical environment.*

An absolute must for us to understand the things you want us to help you resolve and to observe you in your own environment

- *Research discussions with staff, trustees, volunteers*

To gather more information, analyse the data from you and help to form a plan for your future

- *Property workshops for trustees and staff*

To help you learn a little more about the importance of your property to you and everyone in your organisation

- *Desk top study of documents: leases, deeds, maintenance agreements, asset transfer proposals etc.*

A critical assessment and explanation of a range of important property related legal documents

- *Case reports and recommendations*

A comprehensive, jargon free report to address the areas we have looked at together with our recommendations for you to report to your staff and trustee boards