

CARLISLE
CITY COUNCIL



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CORPORATE RESOURCES OVERVIEW AND SCRUTINY COMMITTEE

Committee Report

Public

Date of Meeting: 26 July 2007

Title: ASSET MANAGEMENT PLAN - SURPLUS ASSETS

Report of: DIRECTOR OF DEVELOPMENT SERVICES

Report reference: DS 68/07

Summary:

The Asset Management Plan has been considered by the Executive (report ref DS 49/07) on 31 May 2007, Corporate Resources Overview and Scrutiny Committee on 14 June, and again by the Executive on 2 July 2007. The updated final draft went to Council for approval on 17 July 2007.

The plan shows the Council has surplus assets worth £7,000,000. In the context of the Plan this report defines surplus assets, explains the process by which they are identified and provides details of the properties.

Questions for / input required from Scrutiny:

To comment on the make up of the surplus assets in the context of the Council's Asset Management Plan.

Recommendations:

To note the report and make any comments.

Contact Officer: Raymond Simmons

Ext: 7421

Note: in compliance with section 100d of the Local Government (Access to Information) Act 1985 the report has been prepared in part from the following papers: DS 49/07; DS 64/07; EN 60/02; EN 39/02

1. BACKGROUND INFORMATION

- 1.1** The surplus assets in the Asset Management Plan 2007 – 2012 are defined for accounting purposes in accordance with the requirements of the Chartered Institute of Public Finance and Accountancy (CIPFA). They comprise vacant property or land, or property temporarily occupied for another purpose, or land which is awaiting redevelopment or disposal and which has been declared surplus by the Council.
- 1.2** The criteria for considering and identifying surplus property, guidance on disposal procedures, and the Surplus Asset Strategy was established by the Council in reports to the Executive on 25 March 2002 (EN 039/02, Asset Management Plan – Implementation Surplus Property Guidance Notes) and 27 May 2002 (EN 060/02, Capital Strategy / Asset Management Plan / Best Value – Surplus Asset Strategy). Copies of these reports are attached as Appendix 1 and 2.
- 1.3** The Asset Management Plan identifies 26 assets that are surplus with a total value of £7,000,000. The details of these assets, with a valuation certificate and plan for each, are scheduled in Appendix 3.
- 1.4** The surplus assets may be categorised further as follows:-
 - (i) Assets currently in the process of disposal, such as Raffles development land having of value of £2,600,000.
 - (ii) Assets which are being held pending realisation of development opportunities with an aggregate value of £3,850,250.
 - (iii) Agricultural or amenity land with a total value of £646,000.

APPENDIX 1

REPORT TO EXECUTIVE			
PORTFOLIO AREA: FINANCE & RESOURCES			
Date of Meeting:	25 March 2002		
Public			
Key Decision:	Yes	Recorded in Forward Plan:	Yes
Inside Policy Framework Yes			

Title: ASSET MANAGEMENT PLAN – IMPLEMENTATION
SURPLUS PROPERTY GUIDANCE NOTE

Report of: DIRECTOR OF ENVIRONMENT & DEVELOPMENT

Report reference: EN 039/02

Summary:

This report sets out the background and outlines a new guidance note to appraise whether land and property is surplus to the Council's requirements as an intrinsic part of implementing the new Asset Management Plan.

Recommendations: It is recommended that:

1. The surplus land and property guidance note be approved as outlined in this report;
2. Officers make recommendations to Members after an initial appraisal of potentially surplus assets according to the guidance note at a future meeting of the Executive.

Contact Officer: David Atkinson

Ext: 7420

1. BACKGROUND INFORMATION AND OPTIONS

1. Introduction

1. The Council owns a number of assets which are potentially surplus to requirements.
2. To identify whether such assets are surplus, a guidance note has been prepared for Members' consideration. This is written as a guide to assessing whether it is likely that the Council will want to own a particular parcel of land or property to deliver a service or not.
3. In the Council's Corporate Property Policy approved by the Policy and Resources Committee in April 2001, it was agreed that under-performing assets should be assessed.
4. The ethos behind this part of the implementation of the Council's new Asset Management Plan is in order:
 - i. to create capital receipts so that the Council's Capital Strategy can be funded in order to pursue improved service delivery from existing assets and to develop new schemes; and,
 - ii. to create capital receipts in order to provide an asset investment fund to help improve the Council's asset base, particularly to underpin the sustainability of rental income from the property portfolio.
 1. A guidance note is required in order to judge whether certain assets are under-performing – in advance of making recommendations about whether to declare them surplus to requirements.
 2. By under-performing, it is meant that:
 - a. they are no longer required to deliver a service;
 - b. they are too expensive to maintain delivery of a service: or,
 - c. they are not used or unlikely to be required to deliver a service in the future.
1. This report sets out the national context and a criteria for Members of this Authority to consider.

1. National Guidance

1. "Hot Property" is the national report of an Audit Commission study of Local Authority asset management. One of its main recommendations – which has been encompassed in the Best Value Review of Property Services, following a District Audit report into asset management at this Authority; says:

"review assets and challenge whether they need to be retained. Dispose of assets that do not support core service objectives or fail to make an adequate return on investment".

2. In respect to this Council's Asset Management Plan, the key challenge, as with all Authorities, is to move away from "planning" to "doing". This message was given to the Council by officials of the DTLR recently as part of the feedback into our Capital Strategy and plan – as attached at

Appendix 1.

2. This Council's Current Property Review

1. A review of surplus assets commenced systematically at this Authority in 1996, although progress was restricted by 1999 due to other urgent corporate priorities, ie Kingmoor Park, Lanes extension, Airport etc.
2. This resulted in a number of receipts being generated, such as the McDonalds deal at Kingstown, many single house plots disposed for owner / occupation, and the sale of the Airport.
3. A review of this approach is now recommended in advance of work commencing for the more strategic appraisal of the Council's major assets. A corporate officer group has been established to support this process.
4. The more complex asset reviews can only be prioritised once the corporate plan is approved in support of City Vision.
5. However, as stated by the Audit Commission in "Hot Property", a possible first step is:

"to target 'easy hits' – for example, vacant land".

6. The guidance note outlined at Appendix 2 provides Members with a framework and matrix for considering whether land and property is vacant – and surplus – or whether a more detailed appraisal is needed to ascertain whether they are still required in support of corporate objectives.
7. Members are recommended to approve this. Work will then begin on a sieve of sites and properties in order to make recommendations about whether they should or should not be declared surplus to requirements and then sold.
8. A more scientific approach can commence once the Council acquires a database.

3. Proposed Timetable for this Work-

DATE	TASK	COMMENT
2001 - 2006	Asset Valuations for all Council assets to accord with CIPFA guidance.	Terms of Reference agreed with City Treasurer and District Audit.
January / March 2002	Potentially surplus sites have been identified for valuation and analysis.	Many sites already on the open market but marketing strategy to review.

DATE	TASK	COMMENT

March / April 2002	Tender to private firms in order to undertake asset valuations – 31 March 2002	Tenders received and work awarded – fees to be paid are within the current budgetary arrangements for the property service. Work to be completed by April 2002.
April / May 2002	Analysis of valuations to identify those assets readily available for disposal.	To include an analysis of operational properties in the light of the Disability Discrimination Act to see whether adaptations are value for money.
		Officers to analyse valuations and judge assets against new matrix, to then be considered by Members.
May 2002	Members to consider surplus declaration recommendations.	If Members so wish, to agree surplus land declarations and a marketing strategy.
June 2002	Award disposal programme to private practice.	Marketing strategy to agree.
July 2002	Capital Strategy and Asset Management Plan to be submitted to DTLR.	Members to consider new documents.
August 2002 onwards	Marketing of surplus sites.	Potential capital receipt target is £200,000 / year for the next 3 years.
	Further reports concerning the more strategic sites to be considered by Members, according to Asset Management Plan.	Work to commence once the new corporate plan is known and database acquired in order to analyse property requirements in accordance with Council objectives and financial

		information.
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4. Conference

1. Each asset will have to be reviewed on its own merits.
2. In advance of the work commencing on the more complex appraisals, and before further recommendations are made to Members' about further implementation of the Asset Management Plan, it is recommended that a conference be held to discuss the strategic issues and how property ownership can deliver and implement the new corporate plan in support of City Vision and Corporate Plan. This would take place in the Civic Centre in May and further details will be circulated in due course after consultation with the portfolio holder.

5. Database Procurement

1. In the budget cycle for 2002 / 03, Members' allocated £100,000 for a corporate database to assist the review of assets as recommended by the District Auditor.
2. This procurement of a database is being considered by a corporate officer group representing various departments of the Council and recommendations shall be brought forward shortly.

6. Conclusions

1. In meeting the challenge of a new Asset Management Plan in order to finance the Capital Strategy, this Council is adopting a more strategic approach.
 2. This approach is about:
 - reviewing all property assets by challenging their current use.
 - finding ways to use current property assets more efficiently and effectively.
 - saving costs, increasing the sustainability of income flow and raising capital receipts.
 - improving service delivery by investing capital receipts in asset improvements or using property in different ways, such as shared use with other agencies.
 - in order to finance a capital strategy that delivers services that the people of Carlisle want.
1. The surplus land guidance note – reviewing whether sites are currently surplus to the Council's requirements – is just one element of this.
 2. It should free up a number of assets in order to generate capital receipts.
 3. In respect to the overall Asset Management Plan process and its links to the Capital Strategy and City Vision, a conference is recommended for

Members' consideration.

4. A revised Capital Strategy and Asset Management Plan is required for submission to DTLR by 31 July 2002 and further reports shall be presented to the Executive by Officers for consideration.
5. A more scientific appraisal of Council assets can only be undertaken once a proper database is up and running.

1. CONSULTATION

1. To date:

- Government Northwest of the Department of Transport Local Government and the Regions.
- Best Value Inspectorate.
- District Audit.
- Historic Cities Group.
- Cumbria Best Value Property Group.
- Insignia Richard Ellis.
- Carlisle Chartered Surveyors' Forum.
- Officers & Members of the Council, including the City Treasurer and Head of IT Services.
- Associate of Chief Estates Surveyor

1. Proposed: As above plus individual service heads with focus groups.

1. STAFFING / RESOURCES

1. In the 2002 / 3 budget cycle, Members' resolved to increase funding of the Property Team both during this year and for the following 2 years in order to close the current under-funding gap.
2. The Property Business Plan envisages that there will be a percentage of savings and receipts retained to deliver service. In the first year of trading, the fee level is running at about £130,000 – above the target of £100,000.
3. A capital sum of £100,000 is identified for the database.
4. A mixed economy of internal staffing and external consultants are being used to deliver this strategy, using appropriate skills balance.
5. The size of the Asset Management Plan and Capital Strategy task should be set in the context of other corporate priorities.
6. Capital receipts for 02 / 03 projected to be about £200,000 or thereabouts, estimated on current performance but there are "one off" deals in the pipeline which might raise considerably more.

2. CITY TREASURER'S COMMENTS

The City Treasurer has been consulted.

3. LEGAL COMMENTS

Not required.

4. CORPORATE COMMENTS

The Officer Group for this area of work has been established and consulted.

5. RISK MANAGEMENT ASSESSMENT

1. The service implications are incorporated in the Asset Management Plan.
2. Demand in the market place in order to generate the capital receipts available to fund the Capital Strategy is the ultimate factor that will drive the disposal of surplus sites.
3. Surplus assets are one-off opportunities to raise money and will eventually run out.

6. EQUALITY ISSUES

Not required.

7. ENVIRONMENTAL IMPLICATIONS

1. Incorporated with the Asset Management Plan.
2. Further analysis will be appraised with each asset on a case-by-case basis.

8. CRIME & DISORDER IMPLICATIONS

Not required at this stage.

9. RECOMMENDATIONS - It is recommended that:

1. The surplus land and property guidance note be approved as outlined in this report;
2. Officers make recommendations to Members after an initial appraisal of potentially surplus assets according to the guidance note at a future meeting of the Executive.

10. REASONS FOR RECOMMENDATIONS

1. To begin moving from planning the Asset Management Plan process to "doing".

APPENDIX 1

Mr P Stybelski,
 Chief Executive,
 Carlisle City Council,
 Civic Centre,
CARLISLE,
 Cumbria.
 CA3 8QG.

28th January 2002.

Dear Peter,

SINGLE CAPITAL POT (SCP) 2002-03 – FEEDBACK to LOCAL AUTHORITIES.

Details of your capital allocation for 2002-03, the first full year of the SCP process, will have been sent to you from GONW and DTLR on 13th December. This letter contains feedback on the results of our assessments of your Capital Strategy (CS) and Asset Management Plan (AMP).

The scoring system for the CSs and AMPs was done using a simple three-point scale – Poor, Satisfactory or Good. The assessment process was the subject of wide consultation. The eventual criteria we used in assessing the plans were published in advance on the DTLR's website. Broadly similar scoring methods were applied to both CS and AMP. Any document fulfilling a set of Primary Requirements was classed as "Satisfactory". If it went on to provide clear evidence of achievement in at least 75% of a set of Secondary Requirements then it was classed as "Good". Any documents that did not fulfil all the Primary requirements were classed as "Poor". It should be stressed that these descriptions are purely arbitrary – in Housing terms you may think of them as equating to Above Average, Average and Below Average.

As you will be aware, the assessments for your Authority were:

Capital Strategy	Good
Asset Management Plan	Good

The reasoning behind our assessments was:

Capital Strategy

Carlisle has a well thought out and documented corporate approach to Capital and Asset planning. There is evidence given of its commitment to improvement through Best Value and benchmarking. The Council has very substantial investment holdings generating almost £4 million per year income. Carlisle sees the continuation of a mixed capital and revenue earning asset base as being essential to its future levels of expenditure on services. All Primary Requirements and over 75% of the Secondary Requirements are covered and so the assessment is "Good".

The Council's wholehearted adoption of the Best Value process is admirable, with clear actions set out to address any weaknesses highlighted by the reviews. The BV Inspectors particularly commended the way that elected members have been involved in the process and are committed to the improvements. This made it all the more disappointing that the Best Value report on Economic Development was critical of the Council's corporate approach to property.

Performance Measurement is one area of relative weakness in the Council's documentation, identified as such also by the Best Value inspectors in their report mentioned earlier. Some of the DTLR's Property PIs have relevant data provided (within a table in the AMP rather than the Strategy) but apparently no information is available on others. We note that work is under way to rectify these shortcomings and hopefully more evidence will be available by 2002-03.

Regeneration is one area where a multi-disciplinary approach could be beneficial, involving the Council with residents' groups, business partners, the Police and the Health Service. Hopefully the developing role of Carlisle Vision will become evident here.

Asset Management Plan

Experience throughout the country, not just the North West, suggests that District Councils have found it hard to produce an Asset Management Plan of sufficient quality to be assessed as "Good". This makes Carlisle's achievement all the more satisfying. The only apparent weakness in your data collection is under the performance measurement heading. Even here your AMP fulfils the necessary minima to pass the Primary Requirements, with tabular data against several indicators. In most other respects the plan exceeds the Primary Requirements comfortably. The AMP is well set out, very readable and gives details of the current situation and future plans in every area.

The cross-service aspects of Asset Management planning are well understood and demonstrated. Carlisle's AMP indicates that results from consultations are being incorporated into future plans. The Asset Management Team has already invited stakeholders to attend its meetings.

The system for dealing with surplus assets has been in place for some time now and has produced good results. More evidence is needed on the use of PIs to identify surpluses, and of the corporate consideration of shared use as a possible alternative to disposal. Indeed, as mentioned earlier, Performance Measurement is a comparatively weak spot in Carlisle's Asset Management system. There is clear evidence, with tabular data in the Context sheet, that some PIs are in place but no information is available on others within the DTLR's Property PIs. Unlike most other aspects of the AMP, there is not a clear timetable or plan for ensuring that these gaps are filled.

In summary, therefore, it is very pleasing to be able to assess both your documents as "Good". Any questions you may have about these matters should be referred to Arnold Lee. Tel No. 0151 224 2940

Yours sincerely,

pp Liz Gill,

Cumbria Area Team Leader.

SURPLUS PROPERTY GUIDANCE NOTE

1. Strategy

To maximise the generation of capital receipts from within the Council's existing property portfolio in order to finance the Capital Strategy to meet the needs of the Council in support of the Corporate Plan and City Vision.

2. Supporting Policies

2.1 The following work shall support this Strategy:-

- o The Property Review shall ensure that all property held by the City Council is wholly, necessarily and primarily needed for Council purposes;
- o Property Services shall ensure that property which is or may become surplus

- shall be properly identified and appropriate arrangements put in place for disposal;
- Where property will or may become surplus, full and proper investigations shall be made as to alternative uses as a basis for sale on the open market and all necessary consents obtained.
 - Disposal shall be by the means of tender, private treaty, auction or direct negotiation and shall be the most likely to generate the best consideration that may be reasonably obtained at the time that assets are disposed;
 - Capital receipts so generated shall be treated as corporate receipts, available for distribution at the discretion of the Executive of the Council in support of the Capital Strategy, and Asset Management Plan.

2.2 The City Council gives a high priority to the generation of capital receipts to assist its funding.

- It is important to demonstrate clear links between capital receipts from property disposals and a reinvestment programme for assets.
- Structure Plan and Local Plan policies are important in determining value. The Authority needs to carefully balance its strategic planning role and its interest in managing capital assets through the Code of Conduct in Planning matters.

1. Criteria for Designating Surplus Property

3.1 A judgement shall be made in respect to each asset in Council ownership, for Officers to then make recommendations to Members as to whether they are held for purposes where there is or is not a direct link to delivery of the Council's objectives as defined by the Corporate Plan and City Vision on a case-by-case basis.

3.2 A matrix shall be used, as attached, in order to provide an appropriately defined basis for making recommendations.

SURPLUS PROPERTY DESIGNATION MATRIX

ASSET ADDRESS:

ASSET DESCRIPTION:

	YES / NO
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QUESTION	
1. Is the asset currently being used for direct service delivery?	
• Is the asset likely to be required for direct service delivery in the next 10 years.	
• Is the asset likely to be required to assist supporting the City Vision partners in relation to:.	
<ul style="list-style-type: none"> • Health and wellbeing. • Communities. • Economic prosperity. • Infrastructure, environment and transport. • Celebrating Carlisle. 	

PROPERTY SERVICES ANALYSIS	
1. Current use value	£
2. Alternative use value	£
3. Current rental income	£
4. Potential future rental income	£
5. Current management costs	£
6. Likely disposal fees	£
7. Estimated net capital receipts	£
8. Date when receipt expected	//

CONCLUSIONS	
Is this asset recommend for disposal?	YES / NO

Property Services

March 2002

EX.094/02 LIGHTING PROGRAMME 2002/03 (Key Decision)

Portfolio Infrastructure Environment and Transport

Subject Matter

To consider a report from the Director of Environment and Development (EN.043/02) advising that, as part of its Revenue Budget for 2002/03, the City Council had allocated £16,930 for the provision of new lighting in the District.

The Director's report set out a proposed programme of work for providing new lighting at 17 locations, with 4 reserve locations, which had been prepared after consultation with the Police, having regard to the Crime and Disorder Strategy and on the basis of an approximate one third/two third split between rural and urban locations.

The report also contained an Appendix listing all lighting requests received.

Summary of options rejected

A number of alternative sites which had been the subject of requests were rejected in view of the budgetary constraints.

DECISION

- (1) That the programme of works set out in Table 1.2 of Report EN.043/02 be approved.
- (2) That the agreed programme of works be submitted to the Carlisle Transport Steering Group for discussion.

Reasons for Decision

In order to agree a programme of new lighting for 2002/03 from the requests received, having regard to budgetary constraints and the normal criteria for allocating new lights.

The Carlisle Transport Steering Group are being consulted as the formal approval of the County Council is required to erect new columns on highways.

**EX.095/02: ASSET MANAGEMENT PLAN – IMPLEMENTATION – SURPLUS
PROPERTY GUIDANCE NOTE (Key Decision)**

Portfolio Finance and Resources

Subject Matter

To consider a report from the Director of Environment and Development (<<EN>>. <<039>>/<<02>>) outlining a new guidance note to appraise whether land and property could be classed as surplus to the Council's requirements, as an intrinsic part of implementing the new Asset Management Plan.

The Director advised that the guidance note would provide a written guide to assessing whether its likely that the Council will want to own a particular parcel of land or property to deliver a service or not. The guidance note would be required to judge whether certain assets are underperforming in advance of making recommendations about whether to declare them surplus to requirements. This approach is in line with the ethos behind the Council's new Asset Management Plan.

Summary of options rejected

None

DECISION

1. That the surplus land and property guidance note be approved as outlined in Report <<EN>>.<<039>>/<<02>>.
2. That the Director of Environment and Development be requested to submit a report to a future meeting of the Executive making recommendations after an initial appraisal of potential surplus assets according to the guidance note.

Reasons for Decision

In order to make arrangements for a process to be introduced to identify land and property which may be surplus to the Council's requirements.

EX.096/02 THE DISCRETIONARY RATE RELIEF POLICY (Key Decision)

Portfolio Finance and Resources

Subject Matter

The Leader had agreed to take the item under Rule 15 of the Access to Information Rules (General Exception) as the matter was not included in the Forward Plan for decision in March 2002, but a decision was needed before the next Forward Plan was published.

To consider a Report from the City Treasurer (Financial Memo 2001/02 No.148) setting out a timetable for a review of current arrangements and policy criteria for considering applications for Discretionary Rate Relief having regard to pressures on current budgets.

Summary of options rejected

None

DECISION

1. That the timetable for reviewing the Council's current Discretionary Rate Relief Policy as detailed in Section 3 of the Report be approved and a detailed report be submitted by the City Treasurer to a meeting of the Executive in June 2002.
2. That the Executive consider all new applications for relief for a fixed time period to 31

CARLISLE
CITY COUNCIL



REPORT TO EXECUTIVE

A4

PORTFOLIO AREA: FINANCE & RESOURCES

Date of Meeting: 27 May 2002

Public

Key Decision: Yes

Recorded in Forward Plan: Yes

Inside Policy Framework Yes

Title: CAPITAL STRATEGY / ASSET MANAGEMENT PLAN / BEST
VALUE - SURPLUS ASSET STRATEGY
Report of: DIRECTOR OF ENVIRONMENT & DEVELOPMENT
Report reference: EN 060/02

Summary:

This report sets out one of the key drivers that aims to implement the Council's asset management plan policy. It follows the criteria recently approved by the Executive regarding the identification of surplus assets for potential disposal and identifies sites according to the criteria. A disposal strategy is recommended. It also reviews surplus land procedures and recommends a guidance note be adopted.

Recommendations: It is recommended that:

1. The disposal strategy outlined in this report be approved as part of the implementation;
2. The assets noted be declared surplus to requirements in principle with any individual disposals notified corporately through the Executive after consultation with the portfolio holders.
3. A target of £500,000 of capital receipts be set for 5 years, beginning in 2003/04 subject to ongoing monitoring and review;
4. The property disposal procedure's guidance note be approved;
5. The assets identified as surplus be disposed of according to a prudent strategy, through a marketing process outlined in the guidance note.

Contact Officer: David Atkinson

Ext: 7420

Note: in compliance with section 100d of the Local Government (Access to Information) Act 1985 the report has been prepared in part from the following papers: EN 39/02

1 BACK GROUND INFORMATION & OPTIONS

1.1 Introduction

- 1.1.1 This report is one of a series that is being worked upon which implements the Council's policy concerning its Asset Management Plan.
- 1.1.2 The disposal of surplus assets to finance the capital strategy for new corporate initiatives is a key Government recommendation for proactive asset management planning.
- 1.1.3 The Executive approved a criteria for identifying surplus assets at its meeting on 25 March 2002 (report reference EN 039/02).
- 1.1.4 This criteria has been used by officers to prepare recommendations to Members.
- 1.1.5 The Council's procedures for dealing with the sale of assets have been reviewed.
- 1.1.6 This report seeks approval for assets to be declared surplus to requirements according to a managed strategy, and sold on the basis of the guidance note.

1.2 Background Information

- 1.2.1 The Council has sold many surplus sites over the years as part of a proactive property review. This approach was commended by DTLR in the feedback for the Asset Management Plan.
- 1.2.2 A further review of assets according to the agreed criteria has been undertaken. This has identified a number that are neither linked to the Council's corporate objectives nor achieve high rental income – and are potentially surplus.
- 1.2.3 At Appendix A, a summary list of sites is provided for Members' consideration.
- 1.2.4 As an addendum, in the private part of this Executive, is a valuation for each asset.
- 1.2.5 For Members' information, a detailed file has been deposited with Property Services which includes:
 - (i) A summary sheet of assets and valuations;
 - (ii) A photograph, criteria matrix and plan of each potentially surplus asset.
- 1.2.6 Assets have been sifted according to whether there are complications which require further analysis. The proposed disposal programme envisages beginning with the less complicated where levels of property income are low.
- 1.2.7 Further advice about the more complicated analysis will follow in future reports.
- 1.2.8 The valuation figures are significant but a degree of prudence is required before a target is set because of:
 - (i) The need to achieve a sustainable balance of asset management, between obtaining rental income and raising capital receipts.
 - (ii) The workload and current resources available to manage it within Property Services, Legal Services, Planning and Treasurers.

(iii) The implications for the Carlisle property market.

1.3 *Options*

- 1.3.1 The Council needs to be aware of its general fiduciary duty to its taxpayers.
- 1.3.2 There is a need to ensure a sustainable approach is adopted which meets currently identified financial and operational targets.
- 1.3.3 Land is a finite resource if it is sold at one capital figure. Once it is disposed, there is no rent or further capital available to the Council in the future.
- 1.3.4 With the Council's property portfolio being so large, any disposal strategy must be carefully managed in order that the market is not flooded in any way.
- 1.3.5 Council staffing resources are small and any disposal strategy requires considerable management, monitoring and review so that the process is correctly dealt with.
- 1.3.6 Financially, the Council has a choice to adopt one of three strategies.
 - (a) To generate only rents with no reinvestment to protect tomorrow's income – this is unsustainable.
 - (b) To generate only capital receipts – this is unsustainable.
 - (c) To generate a balance of income and capital receipts – sustainable when managed properly.
- 1.3.7 It is recommended that the Council adopts option (c) through targeting a realistic capital receipt strategy and reinvesting some of this money to protect tomorrow's rental income base as custodians of the public purse.

1.4 *Recommended Disposal Strategy*

- 1.4.1 The outputs are recommended to be:
 - (a) To retain assets where there is a substantial total rental income (above £10,000 per annum as at 1 April 2002).
 - (b) To set an achievable and realistic target of receipts year on year. A target of £500,000 is recommended as being realistic and challenging.
 - (c) To negotiate potential complex one-off development schemes to further Council objectives, which may bring substantial receipts – but not to budget for these in the targets because of the nature of the cases.
- 1.4.2 Each asset is different. Some will be relatively easy to sell – others, very time consuming.
- 1.4.3 It is recommended that the sites noted in Appendix A are declared surplus to requirements.
- 1.4.4 Furthermore it is recommended that a prudent and managed strategy of sales commence, disposing those assets identified over a period of 5 years.
- 1.4.5 For other Council owned assets further work is required. A Corporate Asset Strategy will be reported for consideration to the Executive on 8 July 2002.

- 1.4.6 In all cases, there must be a high degree of corporate consultation and Member reporting through the portfolio holder.
- 1.5 ***Procedures***
- 1.5.1 Public interest in land disposals is high.
- 1.5.2 Procedures need to be robust. Complaints to the local Ombudsman about land disposal are common. Although, to date, at this Council there have been no complaints, it is prudent for its procedures to be reviewed. A guidance note is prepared and attached at Appendix B for consideration. It is recommended for adoption.
- 2 **CONSULTATION**
- 2.1 ***Consultation to Date***
- ♦ DTLR;
 - ♦ Asset Management Officer Group;
 - ♦ District Auditor;
 - ♦ Best Value Inspectorate;
 - ♦ Historic Cities Property Benchmarking Group.
- 2.2 ***Consultation Proposed***
- ♦ Business Stakeholder Forum to be arranged in June.
 - ♦ Marketing of land to the general public according to guidance note.
 - ♦ DTLR as part of Capital Strategy and Asset Management Plan submission in July.
- 3 **STAFFING RESOURCES COMMENTS**
- 3.1 Members' approved a policy that provides for a 5% fee to be taken from capital receipts to cover costs of disposals for Property Services.
- 3.2 It is intended that this flexibility will be used to cover all property management costs. All of the assets will be sold, using private agents, but in-house management will be intense.
- 3.3 This management time falls on other corporate colleagues too – particularly the City Solicitor, Head of Planning and City Treasurer. A further 5% of receipts could be used to cover this element.
- 3.4 As can be seen from the guidance note, it is important to follow proper procedures. This will involve significant time for Legal Services with conveyancing, and development briefs from Planning Services to comply with the Code of Conduct.
- 3.5 Workload on the disposal of land can vary from the negligible to the extremely intensive.
- 3.6 It is recommended that a further 5% of receipts is released to aid the process.
- 3.7 If Members' wish for additional receipts to be generated as a priority over other corporate initiatives, additional staffing is required.

4 CITY TREASURER'S COMMENTS

- 4.1 The City Treasurer has been consulted.

5 LEGAL COMMENTS

- 5.1 The City Solicitor has been consulted.

6 CORPORATE COMMENTS

- 6.1 These are incorporated.

7 RISK MANAGEMENT ASSESSMENT

- 7.1 Any valuation is an analysis of the current open market conditions, which of course vary according to the prevailing circumstances at the time – particularly the local property market in Carlisle.
- 7.2 Valuations of assets are influenced by a large number of factors - national and local economic issues, planning policy, marketing strategy, type of tenure, restrictive covenants, availability of other similar assets in the market, rights of way and a whole host of other factors.
- 7.3 The recommendations made in this report require careful management and monitoring taking into account the characteristics and nature of local issues . This shall be reported back to the portfolio holder regularly.

8 EQUALITY ISSUES

- 8.1 None.

9 ENVIRONMENTAL IMPLICATIONS

- 9.1 The management of surplus land so that it remains neat and tidy is important.

10 CRIME AND DISORDER IMPLICATIONS

- 10.1 The sale of potentially surplus land and its conversion into use for either development or management can reduce crime over time, depending on how the land is used.

11 RECOMMENDATIONS

- 11.1 The disposal strategy outlined in this report be approved as part of the implementation;
- 11.2 The assets noted be declared surplus to requirements in principle with any individual disposals notified corporately through the Executive after consultation with the portfolio holders;
- 11.3 A target of £500,000 of capital receipts be set for 5 years, beginning in 2003/04 subject to ongoing monitoring and review;
- 11.4 The property disposal procedure's guidance note be approved;

- 11.5 The assets identified as surplus be disposed of according to a prudent strategy, through a marketing process outlined in the guidance note.

12 REASONS FOR RECOMMENDATIONS

- 12.1 To comply with Government guidance about the Capital Strategy funding and Asset Management Plan.
- 12.2 To implement Best Value Inspectors' recommendations.
- 12.3 To sell assets not required to meet corporate objectives.
- 12.4 To raise capital receipts to fund future corporate initiatives.
- 12.5 To further support the local economy by enabling the private sector to use land for either its existing use or develop it according to planning guidance.

APPENDIX A - POTENTIALLY SURPLUS ASSETS

Site Reference	Property	Expected Year of receipt
Site 1	Grearshill Road, Kingstown	
Site 2	Wakefield Road / Kingstown Road, Kingstown	03
Site 3	Allotments, Wakefield Road, Kingstown	04
Site 5	North East Quadrant, Junction 44, M6	03
Site 6	Junction 44 North, Parkhouse Road, Kingstown	05
Site 7	Dalston Road, Morton	04
Site 8	Wigton Road, Morton	07
Site 9	Wigton Road, Morton	03
Site 10	Plot 1, Carlisle Airport	03
Site 11:	Plot 2, Carlisle Airport	03
Site 12	Plot 3, Carlisle Airport	03
Site 13	Plot 4, Carlisle Airport	03
Site 14	Plot 5, Carlisle Airport	03
Site 15	Plot 6, Carlisle Airport	03
Site 16	Plot 7, Carlisle Airport	03
Site 17	Land at Knowfield, Carlisle	03
Site 18	Land at Brampton Road, Wallknowe	03
Site 19	Land at Cummersdale, Carlisle	06
Site 20	Land at Gelt Bridge, Brampton	03
Site 21	The Old Isolation Hospital, Moorhouse	03
Site 22	Land at Harker	03
Site 23	Lamplugh Street Car Park, Carlisle	04
Site 24	53 Wigton Road, Carlisle	03
Site 25	Land at Howard Street, Carlisle	05
Site 26	Land at Kingwater Close, Brampton	03
Site 27	Land at Gelt Rise, Brampton	03
Site 28	Land at Lonning Foot, Rockliffe	04
Site 29	Land at Greta Avenue, Carlisle	04
Site 30	Land at Beverley Rise, Haraby	03
Site 31	Land at Greymoorhill/California Road	04
Site 32	Thomas Lane, Burgh Road Industrial Estate	03
Site 33	Land at Moor Road, Longtown	04
Site 36	149 - 153 Botchergate and 1 - 3 South Henry Street	03
Site 37	Sites 2a and 2b, Parkhouse	04
Site 39	14/16 Hutton Way, Belle Vue, Carlisle	03
Site 40	227 Blackwell Road, Carlisle	03
Site 41	Grearshill Road, Kingstown	04
Site 43	Amenity Land, Grearshill Road, Kingstown	05
Site 45	Staffield House, London Road	06

GUIDANCE NOTE
PROPERTY DISPOSAL PROCEDURES

1 Introduction

- 1.1 This is a guidance note of procedures for the disposal of Carlisle Council land and property assets.

2 Summary

- 2.1 The way a Council disposes its land is a matter which attracts public interest.
- 2.2 Local authority land dealings are constrained by legislation. There is an expectation to act fairly.
- 2.3 Complaints of unfairness often result from not following clear procedures consistently.
- 2.4 To ensure and demonstrate to the public that arrangements are above board, arrangements need to be set out in an explicit manner. Inconsistency in the way individual matters are dealt with needs to be prevented.
- 2.5 Councillor involvement in negotiation should be avoided. Financial decisions should be reported to, and taken by, the Executive.
- 2.6 In disposing of land, professional advice must be sought from a qualified chartered surveyor.
- 2.7 Caution is necessary where private treaty is used as a means of disposing of land. Although it may result in a favourable price being received, it frequently leads to complaints. At the end of such a process all parties should be asked to resubmit a bid by a specified date to bring about certainty.
- 2.8 Problems with late bids may be minimised by an early exchange of contracts, and by making it clear in writing that if a different offer is received before the exchange, there may be an obligation to consider it.
- 2.9 Where the council changes its mind about proceeding with land dealings, abortive costs should be reimbursed.
- 2.10 Regard should be made to the Crichton Down* rules.
- 2.11 Land should be sold for the best available price / terms.

* See separate Guidance Note in the Chief Inspector of Audit Code of Practice

3 Background

- 3.1 A private owner of land is usually free to dispose of property as and when and in whatever manner he or she chooses. Local Authorities are subject to constraints. Some of these constraints are dictated by statute; other arise because of a general expectation that Local Authorities should be seen to act openly and fairly.
- 3.2 Land and property dealings by Local Authorities attract keen public interest. It is important to demonstrate to the public that individual transactions are open, transparent and above board.
- 3.3 There needs to be a set of clear procedures. The purpose is to demonstrate that the Council is being open and transparent.
- 3.4 With this in mind, the Chief Inspector of Audit in 1992 drew up a number of recommendations to assist Council's in drawing up a Code of Practice for Land Disposal Procedures. The recommendations are embodied in this guidance note.

4 Statutory Framework

- 4.1 Local Authorities have a statutory duty under Section 123 (2) of the Local Government Act 1972 to achieve the best price. The only exemption is where the Secretary of State gives consent to a disposal at an undervalue, either specifically in response to a request, or as a part of a general disposal consent.
- 4.2 Section 123(2) of the Local Government Act 1972, states *".....except with the consent of the Secretary of State, a Council shall not dispose of land, otherwise than by the way of a short tenancy, for consideration less than the best that can reasonably be obtained"*.
- 4.3 "Land" includes any interest in land and any easement or right in, to or over land.
- 4.4 "Best Consideration" is a concept which has been considered in the courts on a number of occasions. There are a number of principles to consider:
 - (i) The Council owes a duty to its Council Taxpayers to behave as if it were a trustee of any property it administers on their behalf.
 - (ii) The Council has an overriding duty to obtain the best price – the maximum amount - which it can from any land sale.
 - (iii) The Council will need to be realistic in assessing the potential value of land including an assessment of:
 - ♦ What is the most valuable under the existing planning history of the site?
 - ♦ Should an outline permission be applied for prior to sale?
 - ♦ Is the bidder financially sound?
 - ♦ Are there other financially quantifiable benefits contained within a bid?

- (iv) Where the Council is offered social, economic or other benefits along with a bid for land, and the quantifiable consideration offered is not the best that can reasonably be obtained, a consent from the Secretary of State is required before the transaction can be completed. This may be by way of a particular consent for a transaction, or may be deemed under a Disposal Order.
 - (v) Whilst there is a clear statutory duty to obtain best consideration, there is no absolute requirement to market test before disposing of an interest or selecting a development partner. Section 123 gives power to Authorities to dispose of land "*in any manner they see fit*". A competitive marketing exercise is often – but not always – the best way to achieve best price. It is certainly the clearest, most open and transparent way. The type of exercise will depend on individual circumstances such as – type of land, market conditions, presence of special purchaser and nature of disposal envisaged.
- 4.5 A General Consent Order is issued by the Government from time to time, allowing Council's discretion to dispose of property for less than best consideration. The General Disposal Order 1998 is the most recent. It allows for disposal at an undervalue to bodies such as - NHS Trust, Charities, for provision of recreational facilities, and for purposes for which Authorities are empowered to give grants or loans.
- ♦ Flexibility is given in freehold and leasehold disposals. Where the value of the disposal is less than £1,000,000, Authorities are given a 20% margin to accept less than the best consideration. Where the value of the disposal is higher, the latitude is 10%.
 - ♦ The Authority can seek the Secretary of State's specific consent under Section 123 for disposal for less than best consideration in all circumstances in any case.
- 4.6 The Local Government White Paper – Strong Local Leadership (December 2001) indicates that the consent regimes are likely to be repealed. The Paper states "*requirements on Local Authorities to seek Government consent before taking action weaken accountability and stifle innovation*". The DTLR has confirmed that the Section 123(2) consent regime is intended to be abandoned. Detailed arrangements will be subject to consultation in due course.
- 5 This Council's Procedures for Land Disposal**
- 5.1 The objective is to give transparency in a context that the overall aim is to achieve best price in a disposal at all times.
- 5.2 The key documents that should be kept on the file are:-
- 1. Authority for disposal (report / minute reference).
 - 2. Method of disposal
 - 3. Valuation certificate signed by a Chartered Surveyor indicating best price has been achieved.
 - 4. Plan of site with boundaries clearly marked.

5. Sales / marketing budget / costs
 6. Planning permission (s) (if applicable) or Development Brief
 7. Marketing particulars
 8. Advertising record
 9. Log of enquiries
 10. Records of all offers made
 11. Letter indicating final deadline date for offers with full Heads of Terms stated.
 12. Approval and notes of post tender negotiations (if applicable)
 13. Instructions to Legal Services
 14. Completion Notice / Legal document
- 5.3 There are three methods of disposal available, to be used dependent upon the individual circumstances of the case. The preferred method for this Council is number (ii). If the alternative methods are used, authority and justification should be clearly stipulated on the file.
- (i) ***Private Treaty - direct with one prospective purchaser***

This occurs between the vendor and the prospective purchaser privately and in comparative secrecy, normally without any limit on the time within which they must be complete before contracts are exchanged.

The Valuation Officers Liaison Group of the DTLR has commented that *".... The advantages of the Private Treaty method are that it allows a flexible approach, time pressures are seldom imposed on either of the vendor or the purchaser, and it is widely understood and accepted by the general public"*. The disadvantage is that it is in private where the market is not openly tested. It is a method that is to be used with caution in the Local Government field. The Local Government Ombudsman concurs with these views.
 - (ii) ***Open Marketing and then Sale by Private Treaty***

This occurs where an asset is marketed openly for sale or to let, where prospective purchasers are able to bid, subject to Heads of Terms being prepared, with a deadline for bids to be received. The advantage is that it allows all interested parties to bid and, a period of time to negotiate, but certainty must be brought into the process in order to draw negotiations to a close.
 - (iii) ***Public Auction***

A sale by auction does not involve any form of negotiation and is entirely dependent on the number of bidders in the auction room at any particular time. For particular classes of property, the auction market can yield the highest price. It is entirely transparent and there is certainty that a contract will be entered into (assuming there are active bidders in the auction room).

Prices can be rather unpredictable and a sale will not be completed if the Auctioneer sets an unrealistic reserve price. It is usual to use this method as a last resort in a weak property market.

(iv) **Formal Sealed Bids**

Formal sealed bids occur when offers are submitted in a sealed envelope, all of which are opened together. Tenders can still withdraw at any stage up to exchange of contracts. This process can undermine the achievement of best price and is not a flexible method of negotiation if the Council employs professional negotiators, although many Local Authorities are known to use it.

6 Planning

6.1 Planning policy is a major key to determining best consideration when alternative uses are possible on site.

6.2 No development land shall be offered for disposal until the Council has first either secured planning permission for the most profitable use of the land consistent with planning control or for land to be sold according to planning guidance in the form of a Development Brief. This concurs with the Council's Code of Conduct on planning matters.

6.3 Obtaining planning permission (in advance of disposal) for potential development will forestall possible later criticism either that the land has been undersold, or that by selling the land with potential for development, the Council has fettered its discretion when considering a later subsequent planning application. This highlights the need for the Council to separate its statutory duties as landowner from those as Local Planning Authority. Planning policy should be clearly set out in an up to date Development Plan, Planning Brief or Statement.

6.4 There must be no suggestion that the Council has acted in a biased way either in setting planning policy or determining a planning application.

7 Potential Pitfalls

♦ **Late Bids**

It is not uncommon to find that even after a Council has decided to dispose of a site to the highest bidder, an aggrieved party may seek to use Section 123 to get back in the running by submitting a higher bid.

The Council may be bound to consider this issue. This was the case in *R v Lancashire County Council ex parte Telegraph Service Stations* (1989) where the Council had rejected a subsequent higher offer. This was struck down by the Court. In this case, it was held that the Authority were under a duty to consider all the facts of the particular transaction, and to make reasonable steps to investigate opposing bidders' commitments to their highest offer. It must be made plain in the final Heads of Terms offer from the City Council that all bidders must know that there is the risk that the Council may be forced to reconsider the matter prior to sale if a higher offer is received.

♦ ***Revised Bids***

It is not uncommon to find a situation arising where a successful bidder from a non-contractual tender seeks to substitute a lower bid. It is advisable to seek further offers from all interested parties by a given date.

♦ ***The Value of Non-Monetary Benefits***

In *R v Hackney London Borough Council, ex parte Structadene Ltd*, a case decided in November 2001, the Council was taken to task because it had rejected a higher financial bid from one party, on account of the value that would be created by an opposing bidder's scheme (a consortium of tenants) which created 322 new jobs. The Court found that the Council had acted unreasonably in rejecting the higher financial bid.

♦ ***Special Purchaser***

It is important that regard is given to the impact of a special purchaser. It is possible that an open market testing process may not deliver the best results. For example:

- Existing Tenant or Adjacent Owner – someone who already owns part of a site or an adjacent site can demonstrate that additional "marriage" value can be released by combining interests.
- Existing Investor – someone who already has a significant investment in the area and without whose co-operation, a comprehensive approach to development would be difficult.
- Committed Developer – someone with a long track record in delivering quality schemes, who has or is prepared to spend time and money working up a scheme.
- One potential bidder – it is not unusual for there to be just one bidder and best price can often be achieved by negotiating direct, indicating an option to market test if a valuation is not met by the prospective purchaser.

♦ ***Member Involvement***

There is a clear role in approving disposal procedures and taking final decisions to dispose on negotiated terms. The Local Government Ombudsman strongly recommends that Councillors should not directly involve themselves in negotiations.

♦ ***Offers to Sitting Tenant First***

This policy would involve the offer to a sitting tenant of the automatic right of first refusal should a property be declared surplus to the Council's requirements.

The approach should be to consider each case on its merits but still with the objective of obtaining best consideration.

8 Minor Land Disposal

- 8.1 There is a presumption against disposals on housing estates.

8.2 The objectives in establishing the policy are, inter alia, to prevent continued fragmentation of land holdings which may lead to future management problems and to reduce the amount of officers' time spent on small land disposals which are not cost effective.

8.3 It is also to reduce complaints and approaches to Members from aggrieved parties as a result, a common problem for Local Authorities.

9 Recommended Process

9.1 Recommendations about the disposal of assets, to be based upon the following matrix:

SURPLUS PROPERTY DESIGNATION MATRIX

ASSET ADDRESS:

ASSET DESCRIPTION:

QUESTION	YES / NO
1. Is the asset currently being used for direct service delivery?	
2. Is the asset likely to be required for direct service delivery in the next 10 years?	
3. Is the asset likely to be required to assist supporting the City Vision partners in relation to: <ul style="list-style-type: none"> * Health and wellbeing. * Communities. * Economic prosperity. * Infrastructure, environment and transport. * Celebrating Carlisle. 	
PROPERTY SERVICES ANALYSIS	
1. Current use value	£
2. Alternative use value	£
3. Current rental income	£
4. Potential future rental income	£
5. Current management costs	£
6. Likely disposal fees	£
7. Estimated net capital receipts	£
8. Date when receipt expected	/ /
CONCLUSIONS	
Is this asset recommended for disposal?	YES/NO

9.2 If an asset is declared surplus, the following work should be carried out:-

- (1) Prepare a valuation / minimum sale price.
- (2) Plan a marketing strategy / method of sale, timetable for disposal and budget.
- (3) Arrange for property to be left in a clean and tidy condition and make arrangements to pay all service accounts.
- (4) Obtain site plan / floor plans.
- (5) Research property.
- (6) Establish whether "Crichel Down Rules" apply.
- (7) Inspect the property and boundaries.
- (8) Issues to consider: Defective Premises Act, listed buildings, property/ground contamination audit, health and safety issues.
- (9) Consider whether any security measures or other works are necessary prior to disposal.
- (10) Consider whether any improvements / repair works are necessary prior to disposal.
- (11) Assess drainage, services and access in connection with any development potential of the land.
- (12) Establish current and alternative planning uses and obtain planning permission approvals / or development brief.
- (13) Instruct a private chartered surveyor to act as the Council's agent in the disposal, and for regular inspections to take place.
- (14) Agent to prepare sale particulars including any background documentation, according to corporate format communication guidance.
- (15) Agent to arrange sale board and advertising.
- (16) Agent to circulate particulars to interested parties, mailshot database and advise all of the disposal timetable.
- (17) Inform Ward Members of the property sale and forward sale particulars.
- (18) Agent to respond to all queries timely.
- (19) Agent to make appointments and accompanied visits with prospective purchasers.
- (20) Review market strategy and disposal timetable.
- (21) Package the contract, title, planning notices, search and contract enquiries and tenancy details for an early completion.
- (22) Maintain a record of interest shown in the property
- (23) Agent to record all offers received by a specific deadline.
- (24) Consider price, prospective purchaser, track record, any conditional offer and certainty of completion.
- (25) Agent to agree a timetable with prospective purchaser for completion.
- (26) Accept the best price bid.
- (27) Agent to arrange a final deadline for offers based on a full Heads of Terms, making it clear what is being sold and precisely when offers are to be made by
- (28) Agent to Inform all the parties who made an offer accordingly.
- (29) Obtain Member authority to dispose on terms agreed.
- (30) Issue instructions to the City Solicitor.
- (31) Monitor progress of the sale and respond to queries regarding documentation.

- (32) Set out boundaries on site (if appropriate)
- (33) Take final readings and advise service companies.
- (34) Record a Valuation Certificate at best consideration file, signed by a Chartered Surveyor.
- (35) Obtain an independent valuation from the District Valuer if it is felt to be necessary in the circumstances of the case – particularly if there is a potential dispute to resolve.

10 Conclusion

- 10.1 The choice to go out to the market or not and if so, what marketing strategy to pursue, will depend on individual circumstances. What is clear, is that if the Council decides not to test the market, then it should put in place appropriate safeguards to ensure that best consideration can be demonstrated to be achieved. The integrity of the sale process and the planning system must be maintained at all times in any event.

DAVID ATKINSON
HEAD OF PROPERTY SERVICES

May 2002

renewal of the City Council's Insurances for 2002/03.

**EX.138/02 CAPITAL STRATEGY/ <<ASSET>> <<MANAGEMENT>> <<PLAN>>/BEST
VALUE - SURPLUS ASSET STRATEGY (Key Decision)**

Portfolio Finance and Resources

Subject Matter

To consider a report from the Director of Environment and Development (EN.60/02) recommending the disposal of surplus assets to finance the capital strategy for new corporate initiatives which was a key Government recommendation for proactive asset management planning. The Executive had recently approved criteria regarding the identification of surplus assets for potential disposal and the report identified sites in accordance with the criteria.

The Director made recommendations for a disposal strategy to be adopted using the following outputs:-

(a) To retain assets where there is a substantial total rental income (above £10,000 per annum as at 1 April 2002);

b. To set an achievable and realistic target of receipts year on year. A target of £500,000 was recommended as being realistic and challenging;

(c) To negotiate potentially complex one-off development schemes to further Council objectives, which may bring substantial receipts, but not to budget for these in the targets because of the nature of the cases.

The report also contained a Guidance Note for property disposal procedures.

Summary of options rejected

To generate only rents with no reinvestment to protect future income.

To generate only capital receipts.

DECISION

1. That the disposal strategy outlined in Report EN.60/02 be approved as part of the implementation of the <<Asset>> <<Management>> <<Plan>>.

2. That the assets detailed in Appendix A to Report EN.60/02 be declared surplus to requirements in principle with any individual disposals notified corporately through the Executive after consultation with the portfolio holders.

3. That a target of at least £500,000 of capital receipts be set for five years, beginning in 2003/04, subject to ongoing monitoring and review.

4. That the Guidance Note for property disposal procedures be approved.

5. That the assets identified as surplus be disposed of according to a prudent strategy, through a marketing process outlined in the Guidance Note.

Reasons for Decision

SURPLUS ASSETS

ASSET REF		PROPERTY NAME	ASSET VALUE
<i>Currently in the process of disposal</i>			
155	RD007/1	Raffles development land	£2,600,000
			£2,600,000
<i>Held pending realisation of development opportunities</i>			
125	CD002/1	Land at Morton – Retail site off Wigton Road	£750,000
098	CD003/1	Land at Water Street	£110,000
082	DE002/1	Workshop depot to rear Old Raffles Parade Depot	£11,250
138	LE016/1	Land at Low Meadow	£330,000
089	MS011/1	25 – 27 Shady Grove Road	£35,000
122	RD001/1	Land at Wood Street	£150,000
124	RD002/1	Land at Morton – Residential site on Dalston Road	£1,870,000
126	RD003/1	Land at Morton – Residential site off Wigton Road	£245,000
102	RD005/1	Land at Leabourne Road	£23,000
142	RD006/1	Land at Central Longtown	£26,000
167	RD008/1	Land at Gelt Rise	£300,000
			£3,850,250
<i>Agricultural or amenity land</i>			
123	AG001/1	Land bounded by A74 / A7	£72,000
127	AG002/1	Land at Walknowe	£68,000
129	AG003/1	Land at Knowefield	£4,500
130	AG004/1	Land at Geltbridge	£63,000
140	AG006/1	Land to the south west of Kingwater Close	£28,000
070	AG007/1	Land at the Old Isolation Hospital Moorhouse	£46,000
183	AG008/1	Grazing Land at Harker	£21,000
184	AG009/1	Land at Greymoorhill	£84,500
185	AG010/1	Land at Beverly Rise	£13,000
134	LE013/1	Land at Dene Crescent	£8,500
135	LE014/1	Land at Boundary Road	£31,000
139	LE017/1	Land between Eastern Way & Durranhill Road	£28,000
093	MS005/2	Land at Carlisle Airport	£174,000
148	MS012/1	Canal Street Embankment	£4,500
			£646,000
			£7,096,250

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	Not known
Property Asset Reference:	155
Property Code:	RD/007/1
Address:	Raffles – Redevelopment Land
Description:	13 cleared plots of land within the Raffles Estate. The plots vary in size and shape and are subject to a Building Agreement with Lovells. The agreement is 'in brief' for the provision of 450 houses within a 10-year period.
Site Area:	8.9117 ha
Tenure:	Freehold (subject to Development Agreement and Licence)
Condition:	Reasonable
Category:	Surplus
Non-Operational / Operational:	Non-operational
Non-Specialised / Specialised:	Non-specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2007
Estimated Useful Life:	Not Applicable
Valuation:	£2,600,000 (Two Million Six Hundred Thousand Pounds)
Apportionment:	Land £:N/A Buildings £:N/A
Remarks:	Our valuation has regard to the building contract which allows for the base selling price to increase annually in line with build cost inflation. The terms of the contract are reviewable after 5 years and whilst in our valuation we have considered this we have assumed that new terms will not differ significantly from the current terms. This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

Date: 15 April 2007

Qualification: RAYMOND G SIMMONS BSc (Hons) Urban Estate Surveying, MRICS,
Internal Valuer for the Local Authority

ASSET NAME:

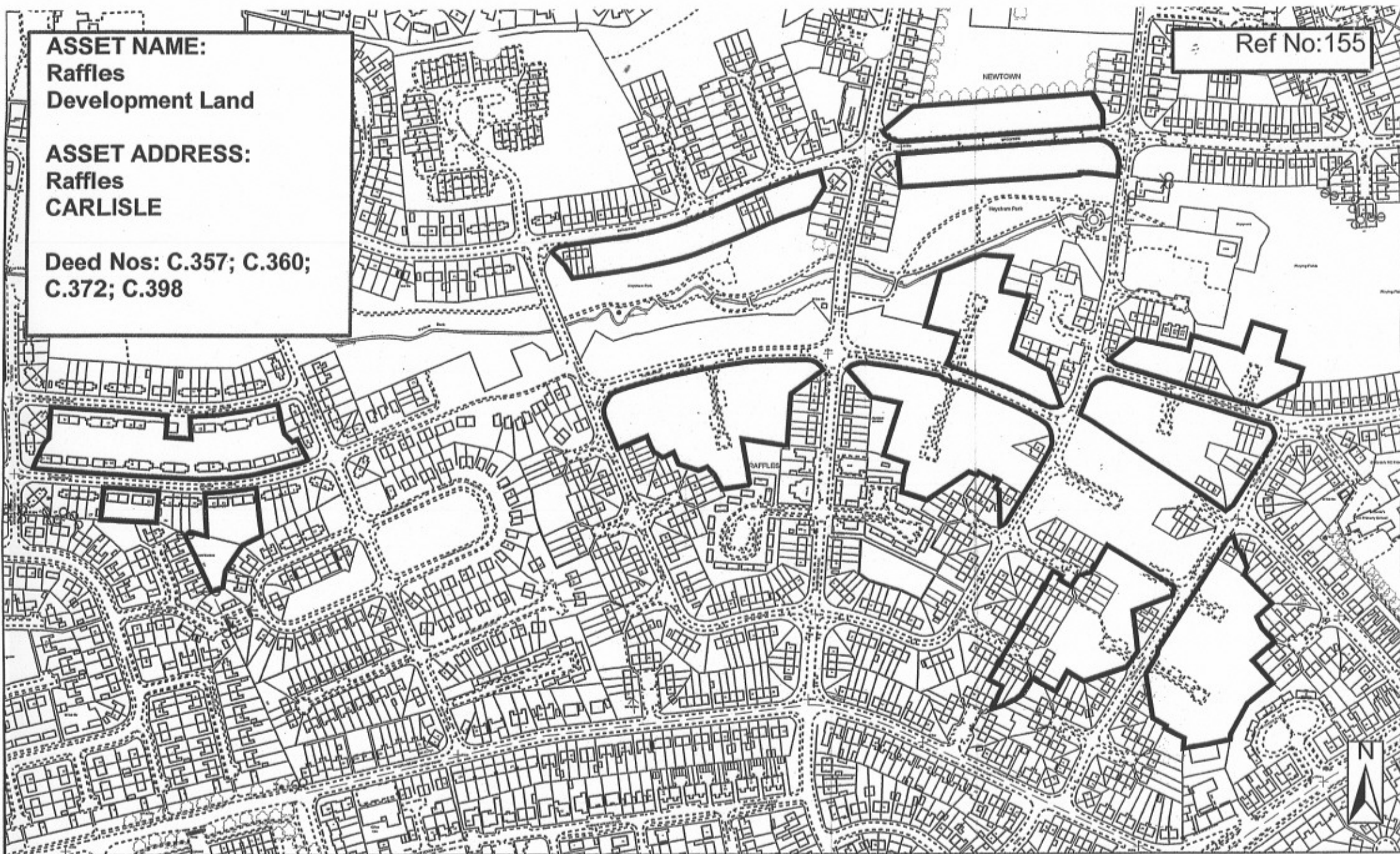
**Raffles
Development Land**

ASSET ADDRESS:

**Raffles
CARLISLE**

**Deed Nos: C.357; C.360;
C.372; C.398**

Ref No:155



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**Raffles
Development Land, CARLISLE**

**CARLISLE
CITY-COUNCIL**



www.carlisle.gov.uk

**Civic Centre
Rickergate
Carlisle
CA3 8QG**

Scale: 1:4,000 Date: 11/04/2007

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ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-H-10203
Property Asset Reference:	125
Property Code:	CD002/1
Address:	Land at Morton, Carlisle, CA2 6JY
Description:	Grazing land off Wigton Road on the south western edge of Carlisle at Morton, scheduled for commercial development.
Site Area:	2.24ha
Tenure:	Freehold
Condition:	Good
Category:	Surplus
Non-Operational / Operational:	Non-Operational
Non-Specialised / Specialised:	Non-Specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2007
Estimated Useful Life:	Not Applicable
Valuation:	£750,000 (Seven Hundred And Fifty Thousand Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

Date: 15 April 2007

Qualification: RAYMOND G SIMMONS BSc (Hons) Urban Estate Surveying, MRICS,
Internal Valuer for the Local Authority

ASSET ADDRESS:
Wigton Road
CARLISLE
Deed nos: C.1120

CARLISLE BORO CONS

GARDISL

GARY E. BOHLEN, JR.

Boon Co. Const. Ed & W. Const. Edy

0.8V/mV

Head of Property Services:
D M Addison Esq (Hons) MRICS
Ordinary City Council, Civic Centre,
CARLISLE CA5 8QB

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DATE: February 2004



1:2500

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ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-ED-10475		
Property Asset Reference:	098		
Property Code:	CD003/1		
Address:	Land at Water Street, Carlisle, CA2 5AW		
Description:	A level, unmade site adjoining the City's inner ring road, south of the City Centre, in a mixed commercial area.		
Site Area:	0.206ha		
Tenure:	Freehold		
Condition:	Poor		
Category:	Surplus		
Non-Operational / Operational:	Non-Operational		
Non-Specialised / Specialised:	Non-Specialised		
Valuation Basis:	Market Value (MV)		
Valuation Date:	31.03.2006		
Estimated Useful Life:	Not applicable		
Valuation:	£110,000 (one hundred and ten thousand pounds)		
Apportionment:	Land £:	N/A	Buildings £: N/A
Remarks:	<p>The site, together with adjoining derelict houses, has development potential.</p> <p>This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).</p>		

Signed: 

Date: 13 April 2006

Qualification: **RAYMOND G SIMMONS BSc (Hons) Urban Estate Surveying, MRICS,**
Internal Valuer for the Local Authority

ASSET NAME:

Land at Water Street

ASSET ADDRESS:

Water Street

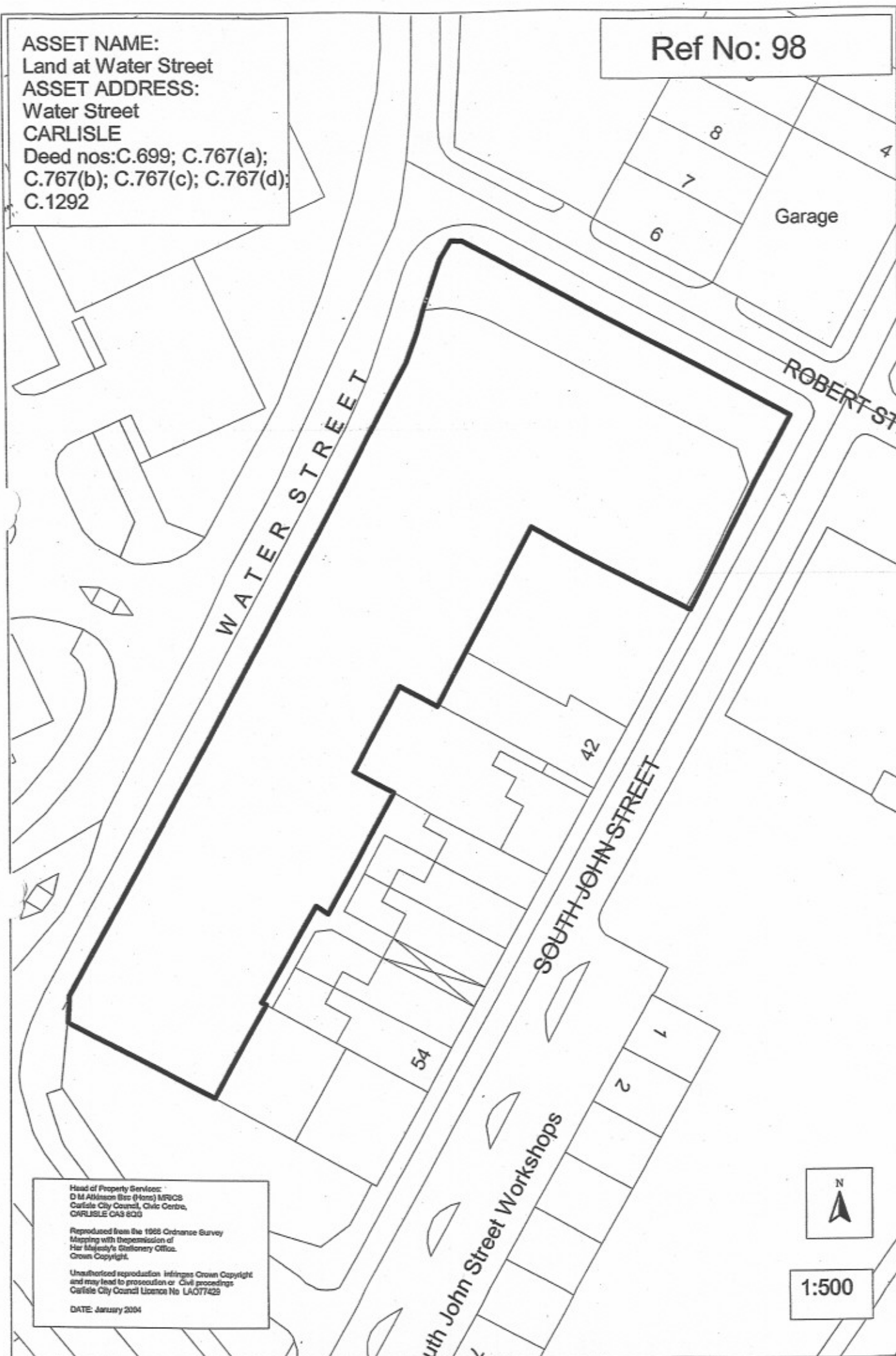
CARLISLE

Deed nos: C.699; C.767(a);

C.767(b); C.767(c); C.767(d);

C.1292

Ref No: 98



Head of Property Services:
D M Aldridge (Mrs) MRICS
Carlisle City Council, Civic Centre,
CARLISLE CA5 6DS

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DATE: January 2004



1:500

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	B-W-20057
Property Asset Reference:	82
Property Code:	DE 002/1
Address:	Workshop Depot to rear of Old Raffles Parade, Carlisle CA2 7EX
Description:	Purpose built depot of portal frame construction < 10 years old.
Site Area:	0.0712 ha
Tenure:	Freehold
Condition:	Good
Category:	Surplus
Non-Operational / Operational:	Non-Operational
Non-Specialised / Specialised:	Non-specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2006
Estimated Useful Life:	Not Applicable
Valuation:	£11,250 (Eleven Thousand Two Hundred and Fifty Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	Valuation is de-minimus. This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

Date:13 April 2006.....

Qualification: Raymond G Simmons BSc (Hons) Urban Estate Surveying, MRICS, Internal Valuer for the Local Authority

Ref No: 82

ASSET NAME:
Workshop Depot
to rear of
Old Raffles Parade
Depot

ASSET ADDRESS:
Old Raffles Parade
CARLISLE
Deed nos: C.372

Head of Property Services:
D M Atkinson BSc (Hons) MRICS
Carlisle City Council, Civic Centre,
CARLISLE CA3 8QG

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DATE: January 2004

Old Raffles Parade



1:500

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-H-10182
Property Asset Reference:	138
Property Code:	LE016/1
Address:	Land at Low Meadow, Raffles, Carlisle, CA2 7QG
Description:	Recreational and amenity land located within residential estate.
Site Area:	2.0591ha
Tenure:	Freehold
Condition:	Satisfactory
Category:	Surplus
Non-Operational / Operational:	Non-Operational
Non-Specialised / Specialised:	Non-Specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2007
Estimated Useful Life:	Not Applicable
Valuation:	£330,000 (Three Hundred & Thirty Thousand Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

Date: 15 April 2007

Qualification: RAYMOND G SIMMONS BSc (Hons) Urban Estate Surveying, MRICS,
Internal Valuer for the Local Authority

ASSET NAME:
Land at Low Meadow

ASSET ADDRESS:
Low Meadow
CARLISLE
Deed Nos.C.398

Ref No: 138

1:1250

Head of Property Services:
D M Atkinson BSc (Hons) MRICS
Carlisle City Council, Civic Centre,
CARLISLE CA3 8QQ

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DATE: January 2004

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	Not known
Property Asset Reference:	089
Property Code:	RU 008/1
Address:	25 / 27 Shady Grove Road, Raffles, Carlisle CA2 7LD
Description:	Vacant site of former retail unit.
Site Area:	0.0657 ha
Tenure:	Freehold
Condition:	Satisfactory
Category:	Surplus
Non-Operational / Operational:	Non-Operational
Non-Specialised / Specialised:	Non-specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2006
Estimated Useful Life:	Not Applicable
Valuation:	£35,000 (Thirty Five Thousand Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed:..........

Date:.....13 April 2006.....

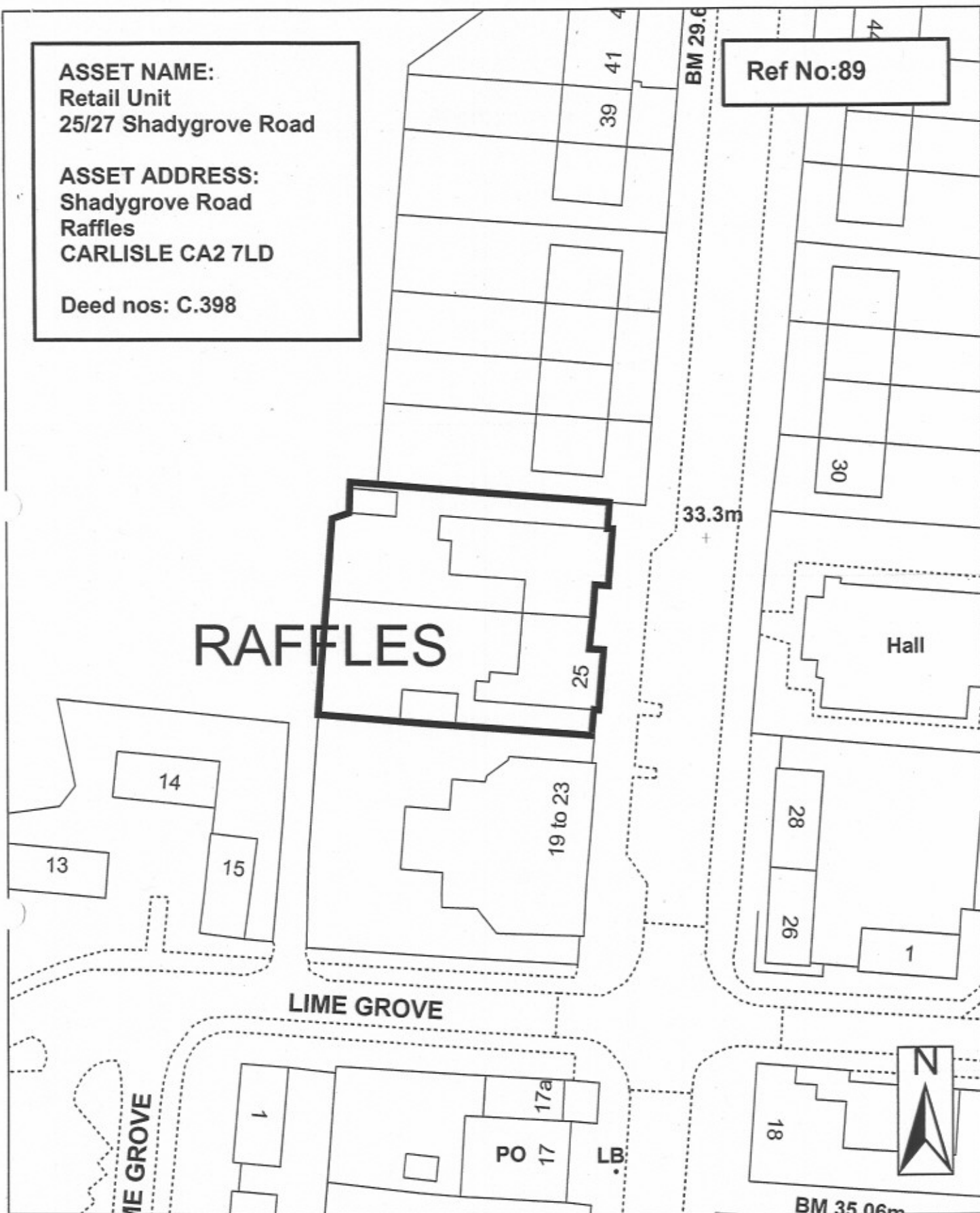
Qualification: Raymond G Simmons BSc (Hons) Urban Estate Surveying, MRICS, Internal Valuer for the Local Authority

ASSET NAME:
Retail Unit
25/27 Shadygrove Road

ASSET ADDRESS:
Shadygrove Road
Raffles
CARLISLE CA2 7LD

Deed nos: C.398

Ref No:89



25/27 Shadygrove Road

Raffles, CARLISLE

Scale: 1:500

Date: 19/4/2006

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CARLISLE
CITY COUNCIL



www.carlisle.gov.uk

**Civic Centre
Rickergate
Carlisle
CA3 8QG**

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-H-10184
Property Asset Reference:	122
Property Code:	RD001/1
Address:	Land at Wood Street, Carlisle, CA2 7JF
Description:	Site of former Newtown Bowling Green located in a residential location off Newtown Road.
Site Area:	0.1659ha
Tenure:	Freehold
Condition:	Fair
Category:	Surplus
Non-Operational / Operational:	Non-Operational
Non-Specialised / Specialised:	Non-Specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31.03.2006
Estimated Useful Life:	Not applicable
Valuation:	£150,000 (one hundred and fifty thousand pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed:.....

Date: 13 April 2006

Qualification: RAYMOND G SIMMONS BSc (Hons) Urban Estate Surveying, MRICS,
Internal Valuer for the Local Authority

ASSET NAME:

Land at
Wood Street

ASSET ADDRESS:

Wood Street
Newtown road
CARLISLE CA2 7JF
Deed nos: C.531; C.554

Ref No: 122

NEWTOWN ROAD

ANN STREET

ISABELLA STREET

BRIGHT STREET

WOOD STREET

Head of Property Services:
D M Atkinson (Bsc (Hons) MRICS)
Carlisle City Council, Civic Centre,
CARLISLE CA2 8QG

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DATE: January 2004



1:500

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ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-ED-10199
Property Asset Reference:	124
Property Code:	RD002/1
Address:	Land at Morton, Dalston Road, Carlisle CA2 6EA
Description:	Amenity and agricultural land off Dalston Road on the south western edge of Carlisle at Morton.
Site Area:	13.3657ha
Tenure:	Freehold
Condition:	Good
Category:	Surplus
Non-Operational / Operational:	Non-Operational
Non-Specialised / Specialised:	Non-Specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2007
Estimated Useful Life:	Not Applicable
Valuation:	£1,870,000 (One Million Eight Hundred & Seventy Thousand Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting, produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

Date: 15 April 2007

Qualification: **RAYMOND G SIMMONS BSc (Hons) Urban Estate Surveying, MRICS,**
Internal Valuer for the Local Authority

Ref No: 124

ASSET NAME:
Land at Morton
Residential site
on Dalston Road

ASSET ADDRESS:
Morton
CARLISLE
Deed Nos.C.1119

Head of Property Services:
D M Allinson BSc (Hons) MRICS
Carlisle City Council, Civic Centre,
CARLISLE CA3 8QS

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DATE: January 2004



1:5000

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-ED-10199
Property Asset Reference:	126
Property Code:	RD003/1
Address:	Land at Morton – residential site off Wigton Road
Description:	A residential development site of approx. 0.782ha
Site Area:	0.7802ha
Tenure:	Freehold
Condition:	Satisfactory
Category:	Surplus
Non-Operational / Operational:	Non-Operational
Non-Specialised / Specialised:	Non-Specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31.03.2006
Estimated Useful Life:	Not applicable
Valuation:	£245,000 (two hundred and forty five thousand pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

Date: 13 April 2006

Qualification: RAYMOND G SIMMONS BSc (Hons) Urban Estate Surveying, MRICS,
Internal Valuer for the Local Authority

Ref No: 126

ASSET NAME:
Land at Morton
Residential site
off Wigton Road

ASSET ADDRESS:
Morton
CARLISLE
Deed Nos.C.1120

53

Head of Property Services:
D M Alderson Bsc (Hons) MRICS
Carlisle City Council, Civic Centre,
CARLISLE CA5 8GG

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DATE: February 2004



1:1250

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	B-W-20058
Property Asset Reference:	102
Property Code:	RD005/1
Address:	Land at Leabourne Road, Carlisle
Description:	Site of former Council depot now residential development land.
Site Area:	0.0533ha
Tenure:	Freehold
Condition:	Poor
Category:	Surplus
Non-Operational / Operational:	Non-Operational
Non-Specialised / Specialised:	Non-Specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31.03.2006
Estimated Useful Life:	Not applicable
Valuation:	£23,000 (twenty three thousand pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	<p>Terms for sale of land agreed but problem with possible contamination.</p> <p>This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).</p>

Signed: 

Date: 13 April 2006

Qualification: **RAYMOND G SIMMONS BSc (Hons) Urban Estate Surveying, MRICS,**
Internal Valuer for the Local Authority

ASSET NAME:
Land at
Leabourne Way

ASSET ADDRESS:
Leabourne Way,
Currock
CARLISLE
Deed nos: C.409 & C.421

Ref No: 102

LEABOURNE ROAD

Depot

EI
Sub Sta

CURROCK WARD

Head of Property Services:
D M Atkinson BSc (Hons) MRICS
Carlisle City Council, Civic Centre,
CARLISLE CA3 8QG

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DATE: January 2004



1:500

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-H-10210
Property Asset Reference:	142
Property Code:	RD006/1
Address:	Land at Central Longtown, Burn Street, Longtown, CA6 5TB
Description:	Gardens and amenity land to the rear of housing in the centre of Longtown, 9 miles north of Carlisle.
Site Area:	0.5961ha
Tenure:	Freehold
Condition:	Overgrown and untidy
Category:	Surplus
Non-Operational / Operational:	Non-Operational
Non-Specialised / Specialised:	Non-Specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31.03.2006
Estimated Useful Life:	Not applicable
Valuation:	£26,000 (twenty six thousand pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed:..........

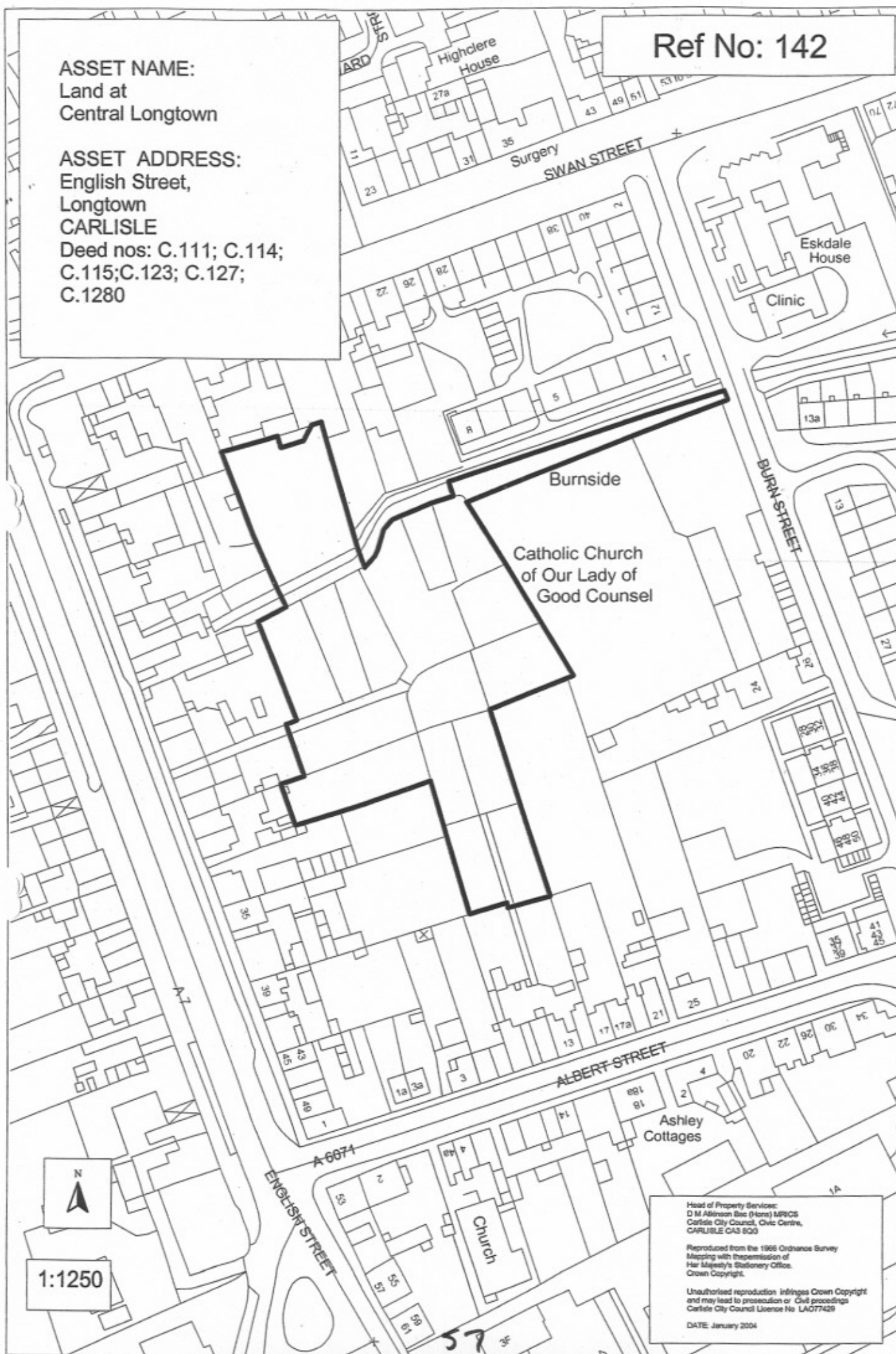
Date: 13 April 2006

Qualification: RAYMOND G SIMMONS BSc (Hons) Urban Estate Surveying, MRICS,
Internal Valuer for the Local Authority

ASSET NAME:
Land at
Central Longtown

ASSET ADDRESS:
English Street,
Longtown
CARLISLE
Deed nos: C.111; C.114;
C.115; C.123; C.127;
C.1280

Ref No: 142



ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	Not known
Property Asset Reference:	Not recorded
Property Code:	Not recorded
Address:	Land at Gelt Rise, Brampton.
Description:	Greenfield site on the eastern fringe of Brampton adjoining existing residential development.
Site Area:	0.54 ha
Tenure:	Freehold
Condition:	Not applicable
Category:	Surplus
Non-Operational / Operational:	Non operational
Non-Specialised / Specialised:	Non specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2006
Estimated Useful Life:	Not applicable
Valuation:	£300,000 (Three Hundred Thousand Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	Allocated in the Local Plan for residential development. This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

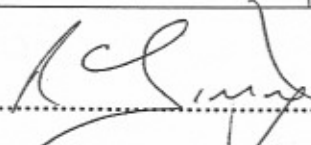
Date: ...16 May 2006.....

Qualification:

Raymond G Simmons BSc (Hons) Urban Estate Surveying,
MRICS, Internal Valuer for the Local Authority.

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-ED-10200
Property Asset Reference:	123
Property Code:	AG 001/1
Address:	Land bounded by A74 / A7, Carlisle CA6 4HW
Description:	Agricultural land amounting to 7.9241 hectares.
Site Area:	7.9241 ha
Tenure:	Freehold
Condition:	Good grazing land
Category:	Surplus
Non-Operational / Operational:	Non-operational
Non-Specialised / Specialised:	Non-specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2006
Estimated Useful Life:	Not Applicable
Valuation:	£72,000 (Seventy Two Thousand Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

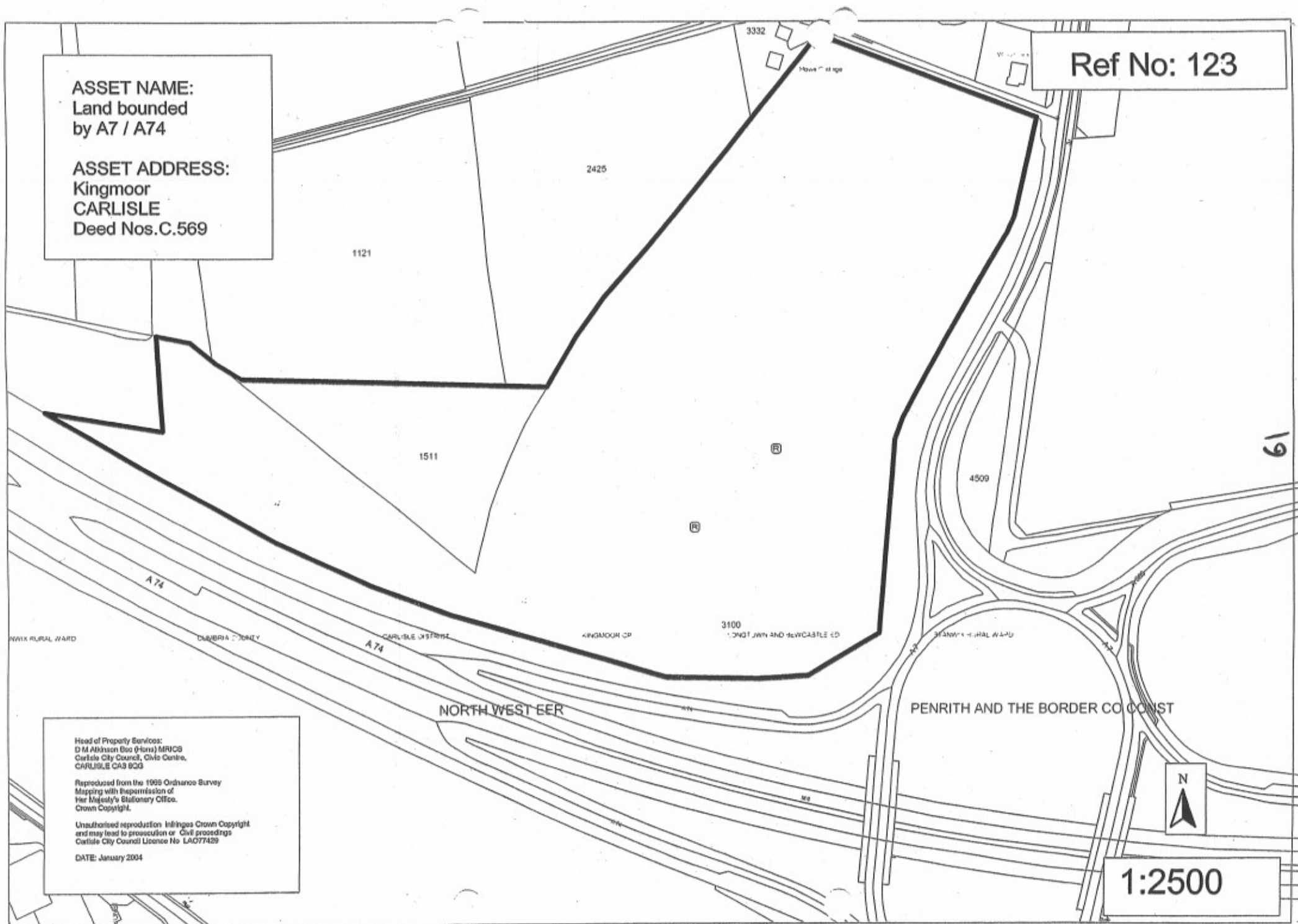
Date:13 April 2006.....

Qualification: Raymond G Simmons BSc (Hons) Urban Estate Surveying, MRICS, Internal Valuer for the Local Authority

Ref No: 123

ASSET NAME:
Land bounded
by A7 / A74

ASSET ADDRESS:
Kingmoor
CARLISLE
Deed Nos.C.569



Head of Property Services:
D M Robinson Esq (Hons) MRICS
Carlisle City Council, Civic Centre,
CARLISLE CA3 9DG

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DATE: January 2004

1:2500

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-ED-10473
Property Asset Reference:	127
Property Code:	AG 002/1
Address:	Land at Wallknowe, Brampton Road, Carlisle CA3 9BJ
Description:	Area of gently sloping grazing land on the north eastern fringe of the City. The land contains the route of Hadrian's Wall.
Site Area:	11.2105 ha
Tenure:	Freehold
Condition:	Reasonable grazing land
Category:	Surplus
Non-Operational / Operational:	Non-operational
Non-Specialised / Specialised:	Non-specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2007
Estimated Useful Life:	Not Applicable
Valuation:	£68,000 (sixty eight thousand pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	The valuation assumes no potential for residential development in the short / medium term. This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

Date: 15 April 2007

Qualification: Raymond G Simmons BSc (Hons) Urban Estate Surveying, MRICS, Internal Valuer for the Local Authority

Ref No: 127

ASSET NAME:
Land at Walknowe

ASSET ADDRESS:
Brampton Road
CARLISLE
Deed nos:



Head of Property Services
D M Allinson Esq (Hons) MRICS
Carlisle City Council, Civic Centre,
CARLISLE CA2 8QS

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DATE: February 2004



1:3500

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-L-10190
Property Asset Reference:	129
Property Code:	AG 003/1
Address:	Land at Knowefield, Brampton Road, Carlisle CA3 9BJ
Description:	A small level field amounting to approximately 1.3329 ha.
Site Area:	1.3329 ha
Tenure:	Freehold
Condition:	Poor
Category:	Surplus
Non-Operational / Operational:	Non-operational
Non-Specialised / Specialised:	Non-specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2006
Estimated Useful Life:	Not Applicable
Valuation:	£4,500 (Four Thousand Five Hundred Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	Valuation is de minimus. This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

Date: 13 April 2006

Qualification: Raymond G Simmons BSc (Hons) Urban Estate Surveying, MRICS, Internal Valuer for the Local Authority

Ref No: 129

ASSET NAME:
Land at Knowefield

ASSET ADDRESS:
Brampton Road
CARLISLE
Deed nos:

CARLISLE DISTRICT

STANWIX RURAL CP

STANWIX URBAN ED

CUMBRIA COUNTY

CARLISLE DISTRICT

STANWIX URBAN ED

STANWIX

NORTH WEST ESK

Head of Property Services:
D M Alderson Esq (Hons) MRICS
Carlisle City Council, Civic Centre,
CARLISLE CA3 8DS

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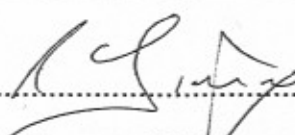
DATE: February 2004



1:2500

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-H-10463
Property Asset Reference:	130
Property Code:	AG 004/1
Address:	Land at Geltbridge, Brampton
Description:	Agricultural land located adjacent to A69 on outskirts of Brampton. The land surrounds the former Capontree Hill Refuse Tip owned by the County Council.
Site Area:	12.7821 ha
Tenure:	Freehold
Condition:	Good grazing land
Category:	Surplus
Non-Operational / Operational:	Non-operational
Non-Specialised / Specialised:	Non-specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2006
Estimated Useful Life:	Not Applicable
Valuation:	£63,000 (Sixty Three Thousand Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

Date: ...13 April 2006.....

Qualification: Raymond G Simmons BSc (Hons) Urban Estate Surveying, MRICS, Internal Valuer for the Local Authority

ASSET NAME:
Land at Geltbridge

ASSET ADDRESS:
Geltbridge
Barmpton
CARLISLE
Deed Nos.: C.1110

Ref No: 130

COUNTY COUNCIL

Head of Property Services:
D M Alderson Bsc (Hons) MRICS
Carlisle City Council, Civic Centre,
CARLISLE CA3 8QB

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DATE: February 2004



1:4000

67

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-H-10213
Property Asset Reference:	140
Property Code:	AG 006/1
Address:	Land to south west of Kingwater Close, Brampton CA8 1SU
Description:	Agricultural land south west of Brampton town centre on the fringe of residential development at Gelt Rise.
Site Area:	2.3529 ha
Tenure:	Freehold
Condition:	Good
Category:	Surplus
Non-Operational / Operational:	Non-operational
Non-Specialised / Specialised:	Non-specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2006
Estimated Useful Life:	Not Applicable
Valuation:	£28,000 (Twenty Eight Thousand Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	Valuation reflects some element of hope value for residential development. This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

Date:13 April 2006.....

Qualification: Raymond G Simmons BSc (Hons) Urban Estate Surveying, MRICS, Internal Valuer for the Local Authority

Ref No: 140

ASSET NAME:
Land South West of
Kingwater Close

ASSET ADDRESS:
Kingwater Close
Brampton
CARLISLE
Deed nos: C.57

Green
Lane House

Capon Tree
Veterinary
Centre



1:1250

Head of Property Services:
D M Atkinson Esq (Hon) MBE
Carlisle City Council, Civic Centre,
CARLISLE CA3 8QG

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DATE: January 2004

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-ED-10198
Property Asset Reference:	Not recorded
Property Code:	AG 007/1
Address:	Land at Old Isolation Hospital, Moorhouse, Carlisle
Description:	Good gently sloping land, in two enclosures, one with iron railings from the former isolation hospital, accessed from a private track off Moorhouse Road, 3 miles west of Carlisle city centre.
Site Area:	5.3184 ha
Tenure:	Freehold
Condition:	Good gently sloping land
Category:	Surplus
Non-Operational / Operational:	Non-operational
Non-Specialised / Specialised:	Non-specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2007
Estimated Useful Life:	Not Applicable
Valuation:	£46,000 (Forty Six Thousand Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

Date: 15 April 2007

Qualification: Raymond G Simmons BSc (Hons) Urban Estate Surveying, MRICS, Internal Valuer for the Local Authority

ASSET NAME:
Land at Old
Isolation Hospital

ASSET ADDRESS:
Moorhouse
CARLISLE

Deed nos: C.358

Ref No: 70

The Old
Isolation
Hospital

Durfield

Reservoir

Edgely
Work

One Beck



Land at Old Isolation Hospital

Moorehouse, CARLISLE

Scale: 1:2,500 Date: 19/4/2006

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**Civic Centre
Rickergate
Carlisle
CA3 8QG**

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-H-10240
Property Asset Reference:	183
Property Code:	Not recorded
Address:	Land at Harker, Carlisle.
Description:	The land is situated on the east side of the A74, opposite Kingmoor Business Park, about 3 miles north of Carlisle City Centre.
Site Area:	4.04 ha
Tenure:	Freehold
Condition:	Satisfactory
Category:	Surplus
Non-Operational / Operational:	Non operational
Non-Specialised / Specialised:	Non specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2006
Estimated Useful Life:	Not applicable
Valuation:	£21,000 (Twenty One Thousand Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: _____

Date:...16 May 2006.....

Qualification:.....

Raymond G Simmons BSc (Hons) Urban Estate Surveying,
MRICS, Internal Valuer for the Local Authority.

ABBREVIATED VALUATION CERTIFICATE

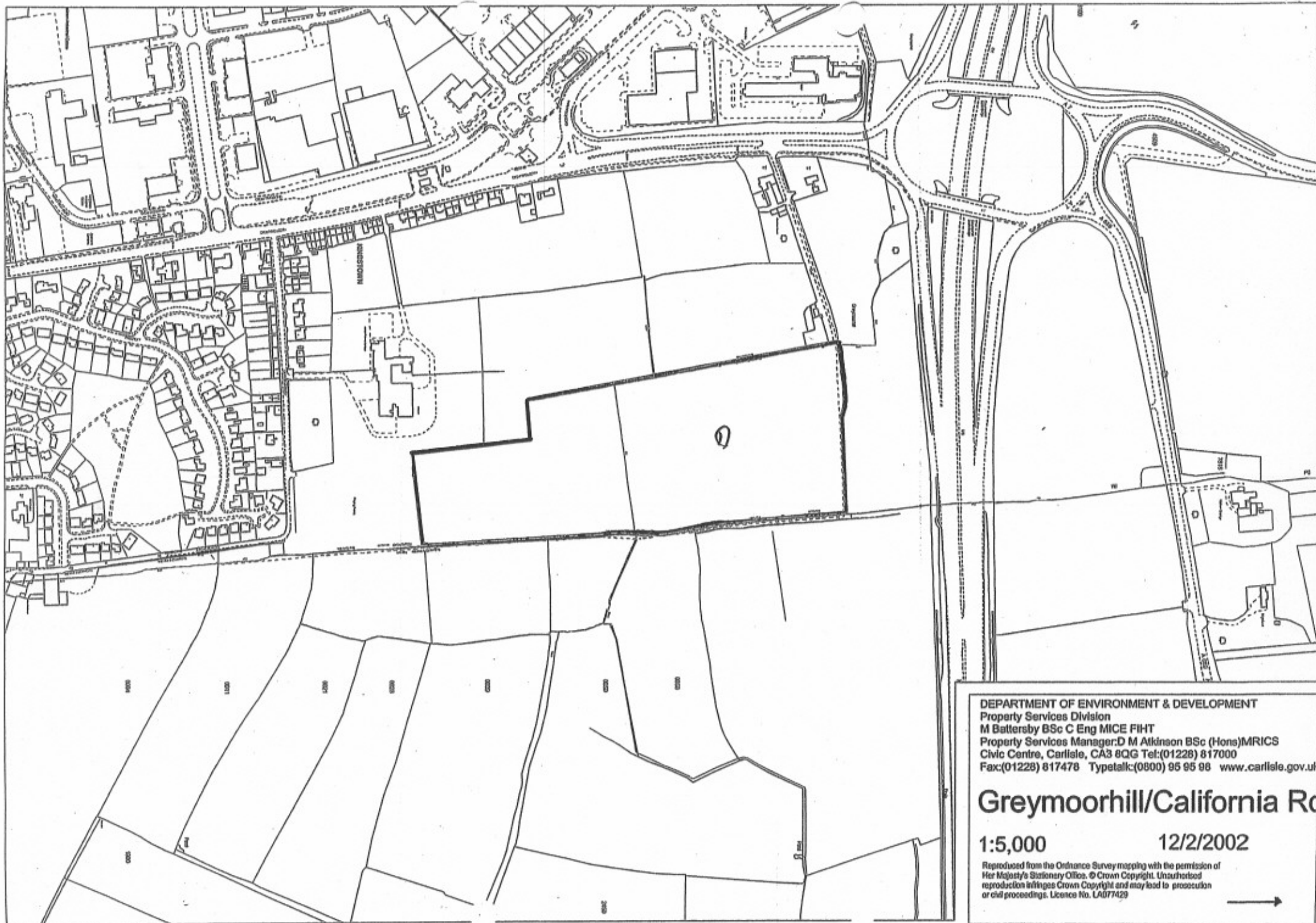
Financial Reference No:	L-H-10197
Property Asset Reference:	184
Property Code:	Not recorded
Address:	Land at Greymoorhill, Carlisle.
Description:	Sloping land in 2 enclosures with access off a private road past Greymoor House. 2 miles north of the City Centre, near junction 44 of the M6 motorway.
Site Area:	6.57 ha
Tenure:	Freehold
Condition:	Good grazing land
Category:	Surplus
Non-Operational / Operational:	Non operational
Non-Specialised / Specialised:	Non specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2006
Estimated Useful Life:	Not applicable
Valuation:	£84,500 (Eighty Four Thousand Five Hundred Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

Date: ...16 May 2006.....

Qualification:

Raymond G Simmons BSc (Hons) Urban Estate Surveying,
MRICS, Internal Valuer for the Local Authority.



DEPARTMENT OF ENVIRONMENT & DEVELOPMENT
Property Services Division
M Battersby BSc C Eng MICE FIHT
Property Services Manager: D M Atkinson BSc (Hons) MRICS
Civic Centre, Carlisle, CA3 8QG Tel: (01228) 817000
Fax: (01228) 817478 Typetalk: (0800) 95 95 98 www.carlisle.gov.uk

Greymoorhill/California Rd

1:5,000

12/2/2002

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ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-H-10195
Property Asset Reference:	185
Property Code:	Not recorded
Address:	Land at Beverley Rise, Harraby, Carlisle CA1 3RY
Description:	An area of sloping agricultural land on the eastern fringe of the City adjoining Harraby Estate, close to the M6 motorway.
Site Area:	2.147 ha
Tenure:	Freehold
Condition:	Good
Category:	Surplus
Non-Operational / Operational:	Non operational
Non-Specialised / Specialised:	Non specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2006
Estimated Useful Life:	Not applicable
Valuation:	£13,000 (Thirteen Thousand Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	Valuation is de-minimus. This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed:..........

Date:....16 May 2006.....

Qualification:.....

Raymond G Simmons BSc (Hons) Urban Estate Surveying,
MRICS, Internal Valuer for the Local Authority.



DEPARTMENT OF ENVIRONMENT & DEVELOPMENT
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Fax: (01228) 817478 Typetalk: (0800) 95 95 98 www.carlisle.gov.uk

Beverley Rise, Harraby

1:1,250

30/1/2002

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ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-H-10176
Property Asset Reference:	134
Property Code:	LE013/1
Address:	Land at Dene Crescent, Carlisle
Description:	Two linked areas of open grassland within a former local authority housing estate at Belah, 1 mile north of the City Centre.
Site Area:	2.1889ha
Tenure:	Freehold
Condition:	Good
Category:	Surplus
Non-Operational / Operational:	Non-Operational
Non-Specialised / Specialised:	Non-Specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31.03.2006
Estimated Useful Life:	Not applicable
Valuation:	£8,500 (eight thousand five hundred pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	<p>The land is zoned for amenity use in the Local Plan. Valuation is de-minimus. This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).</p> <p><i>Valuation is de-minimus</i></p>

Signed: 

Date: 13 April 2006

Qualification: **RAYMOND G SIMMONS BSc (Hons) Urban Estate Surveying, MRICS,**
Internal Valuer for the Local Authority

ASSET NAME:
Land at Dene Crescent

ASSET ADDRESS:
Dene crescent
Belah
CARLISLE
Deed Nos.: C.300; C.393

Ref No: 134



Head of Property Services:
D M Johnson Bsc (Hons) MRICS
Carlisle City Council, Civic Centre,
CARLISLE CA3 8QG

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DATE: February 2004

1:1250

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-H-10177
Property Asset Reference:	135
Property Code:	LE014/1
Address:	Land at Boundary Road, Upperby, Carlisle
Description:	An area of land comprising part school playing field, open space and pigeon lofts just, south east of the City Centre.
Site Area:	4.9959ha
Tenure:	Freehold
Condition:	Poor quality land
Category:	Surplus
Non-Operational / Operational:	Non-Operational
Non-Specialised / Specialised:	Non-Specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31.03.2007
Estimated Useful Life:	N/A
Valuation:	£31,000 (Thirty One Thousand Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

Date: 15 April 2007

Qualification: **RAYMOND G SIMMONS BSc (Hons) Urban Estate Surveying, MRICS,**
Internal Valuer for the Local Authority

ASSET NAME:
Land at Upperby Road

ASSET ADDRESS:
Upperby
CARLISLE
Deed Nos.: C.302; C.493;
C.1019; C.1026

Ref No: 135



1:2500

Head of Property Services:
D M Atkinson BSc (Hons) MRICS
Carlisle City Council, Civic Centre,
CARLISLE CA3 8SS

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DATE: February 2004

18

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	L-H-10209
Property Asset Reference:	139
Property Code:	LE017/1
Address:	Land between Eastern Way and Durranhill Road, Carlisle
Description:	An area of open space adjacent to housing estate and dual carriageway.
Site Area:	0.3897ha
Tenure:	Freehold
Condition:	Satisfactory
Category:	Surplus
Non-Operational / Operational:	Non-Operational
Non-Specialised / Specialised:	Non-Specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31.03.2006
Estimated Useful Life:	Not applicable
Valuation:	£28,000 (twenty eight thousand pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed:.....

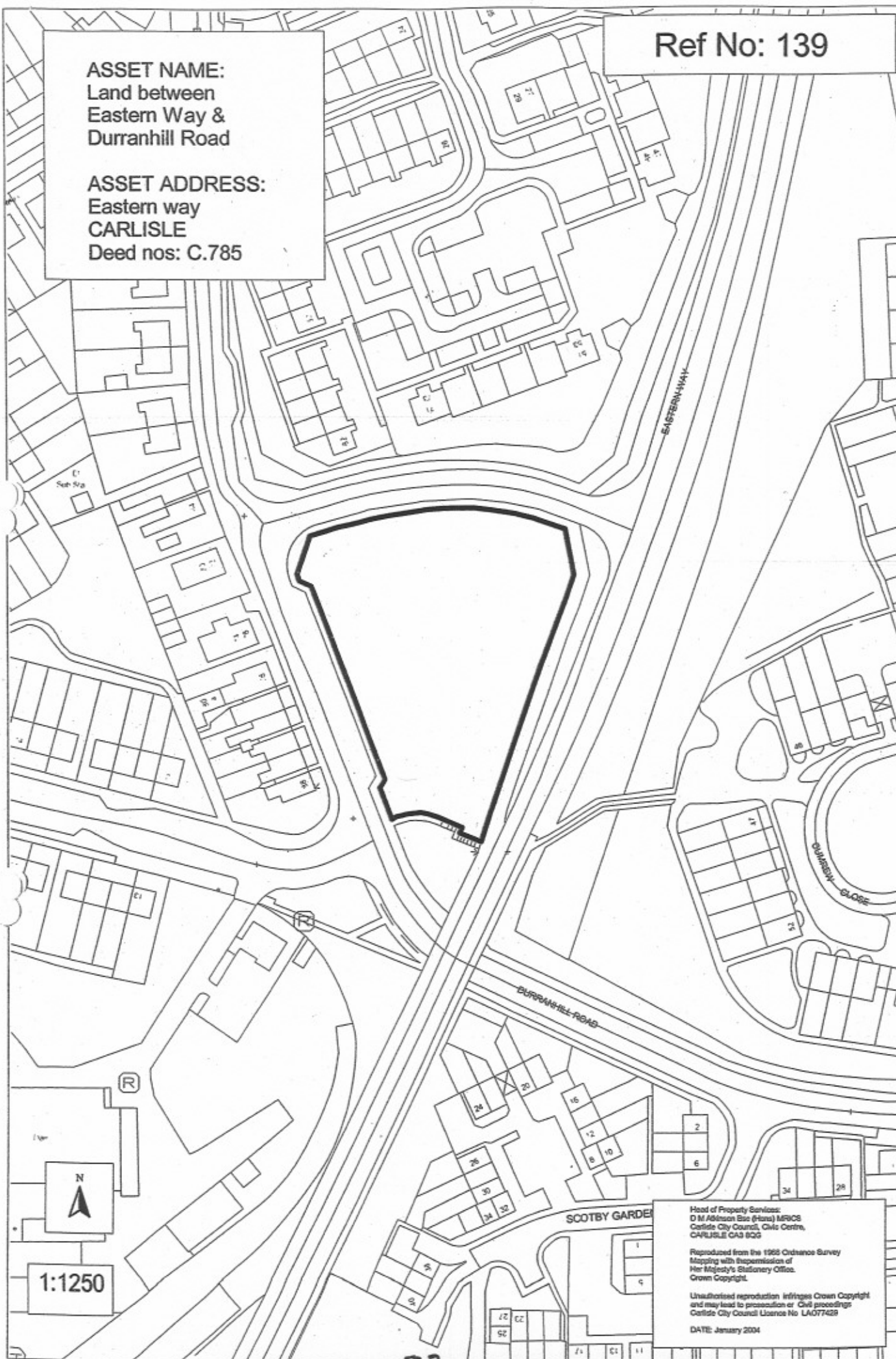
Date: 13 April 2006

Qualification: **RAYMOND G SIMMONS BSc (Hons) Urban Estate Surveying, MRICS,**
Internal Valuer for the Local Authority

Ref No: 139

ASSET NAME:
Land between
Eastern Way &
Durranhill Road

ASSET ADDRESS:
Eastern way
CARLISLE
Deed nos: C.785



1:1250

Head of Property Services:
D M Atkinson Bsc (Hons) MRICS
Carlisle City Council, Civic Centre,
CARLISLE CA3 8GG


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DATE: January 2004

ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	B-ED-20039
Property Asset Reference:	93
Property Code:	MS 005/2
Address:	Land at Carlisle Airport, CA6 4PJ
Description:	Six separate fields and a small area of scrub woodland located around Carlisle Airport.
Site Area:	24.8463 ha
Tenure:	Freehold
Condition:	Satisfactory
Category:	Surplus
Non-Operational / Operational:	Non-operational
Non-Specialised / Specialised:	Non-specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31 March 2006
Estimated Useful Life:	Not Applicable
Valuation:	£174,000 (One Hundred and Seventy Four Thousand Pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

Date:13 April 2006.....

Qualification: **Raymond G Simmons BSc (Hons) Urban Estate Surveying, MRICS, Internal Valuer for the Local Authority**

ASSET NAME:
Land at Carlisle Airport

ASSET ADDRESS:
Carlisle Airport
CARLISLE
Deed Nos.C.695

Ref No: 93

Head of Property Services:
D M Alderson BSc (Hons) MRICS
Carlisle City Council, Civic Centre,
CARLISLE CA3 8QG

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DATE: December 2003



1:10000

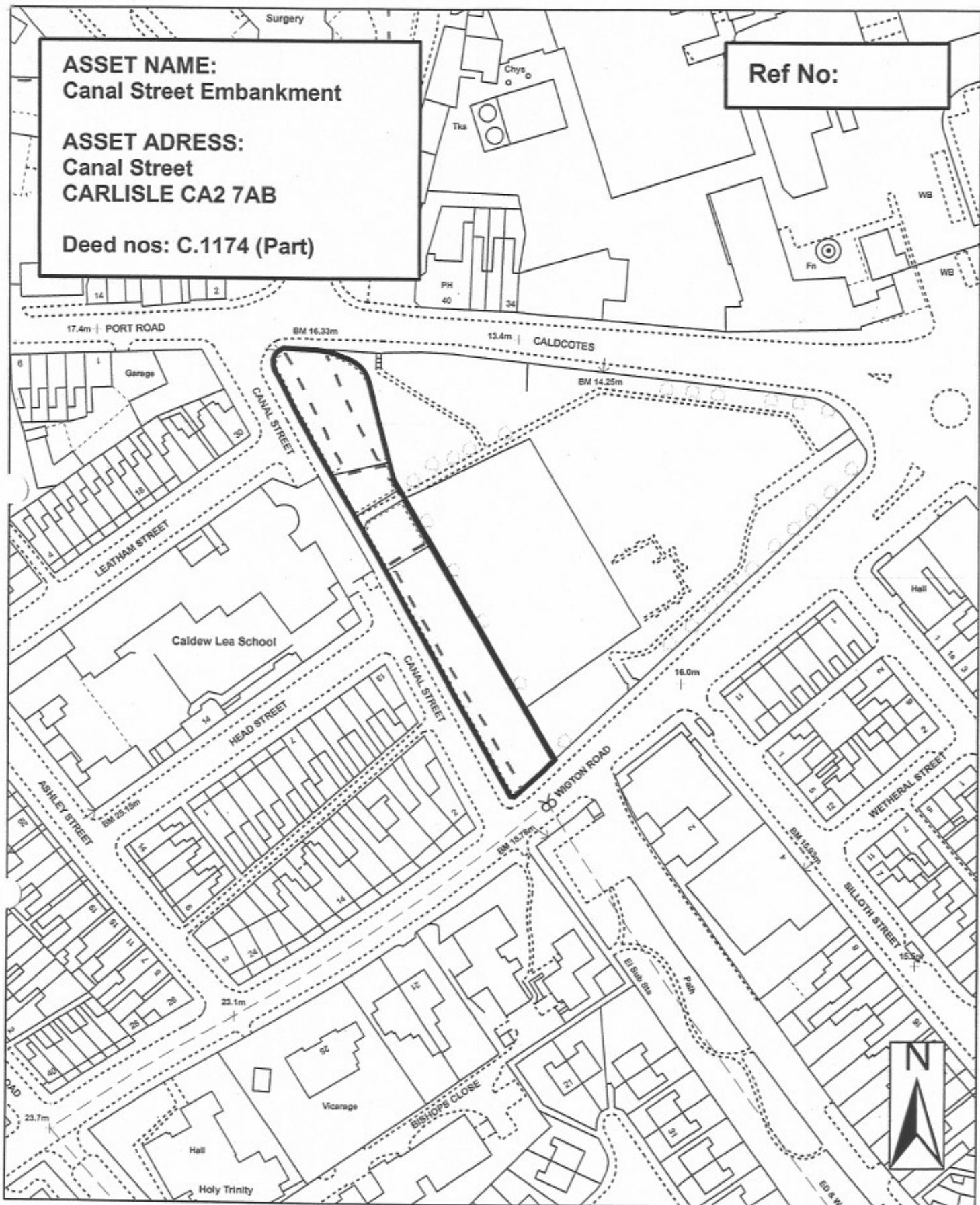
ABBREVIATED VALUATION CERTIFICATE

Financial Reference No:	Not known
Property Asset Reference:	Not recorded
Property Code:	M007/1
Address:	Canal Street Embankment, Canal Street, Carlisle, CA2 7AB
Description:	0.1855 ha of amenity land, part of which is leased to the County for use as school playground extension at Caldew Lea School.
Site Area:	0.1855ha
Tenure:	Freehold
Condition:	Fair
Category:	Surplus
Non-Operational / Operational:	Non-Operational
Non-Specialised / Specialised:	Non-Specialised
Valuation Basis:	Market Value (MV)
Valuation Date:	31.03.2006
Estimated Useful Life:	Not applicable
Valuation:	£4,500 (four thousand five hundred pounds)
Apportionment:	Land £: N/A Buildings £: N/A
Remarks:	Valuation is de-minimus. Previously known as Old Railway Line at Port Road. This valuation has been carried out in accordance with the current Code of Practice on Local Authority Accounting produced by CIPFA and the RICS Appraisal and Valuation Standards (The Red Book).

Signed: 

Date: 13 April 2006

Qualification: **RAYMOND G SIMMONS BSc (Hons) Urban Estate Surveying, MRICS,**
Internal Valuer for the Local Authority



Canal Street Embankment

Canal Street, CARLISLE

Scale: 1:1,250 Date: 19/4/2006

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**Civic Centre
Rickergate
Carlisle
CA3 8QG**