

Property Advice Service: Service Statement

This Service Statement sets out the Property Advice Services offered by the Ethical Property Foundation. It sets out what you can expect from the Foundation when you use the Services, and what we will ask of you as a Service user.

In using any aspect of the Foundation's Property Advice Services you are accepting the conditions set out in this Service Statement.

1. Who are we?

The Ethical Property Foundation is a national charity committed to ensuring charities and non-profit organisations thrive through effective, affordable property advice, training and support.

2. What are the Property Advice Services?

Property Advice Services are provided to clients of the Foundation. They include:

- Comprehensive online resources
- Initial and / or ongoing, in-depth support from our in-house Property Advisers on a wide variety of property matters
- Referrals to a Register of property professionals, who provide some initial pro bono time and discounted rate support to our clients
- Training packages for individual clients and groups
- Larger projects such as feasibility studies, options appraisals, pre-project support and more.

Initial support from our Property Advisers is available free of at the point of delivery to the organisations with lowest income and greatest need. This element of free support is supported by our grant funders. When you contact the Foundation, you will be informed whether your organisation qualifies for grant-aided support.

After this grant-aided support has ended, or if your organisation does not qualify for grant-aided support, the Foundation charges on an hourly or day rate basis. The rate we would charge is again measured on income and level of need. A Property Adviser will be able to clarify the rate your organisation would be charged.

The Foundation charges for its time on training packages and work on larger projects on a case by case basis, depending on the work required. A Property Adviser will be able to advise you further on this.

3. What do we ask of you?

In using any of our Property Advice Services you agree to assist us by providing feedback on your experience and the outcomes of our work with you. A short feedback survey is sent out to clients every six months which provides us with information on the

impact of our work. In order for us to continue providing grant aided support to organisations in need, we need to be able to demonstrate our work effectively. We therefore would ask all clients to take the time to fill out this survey when it is sent to you.

We ask that you treat our in-house Advisers with respect, respond to communications as promptly as possible and provide us with information we ask for to assist with your issue.

4. What sort of organisations are eligible for grant aided support?

Grant aided support is available to charities, voluntary and community groups, social enterprises and other not for profits. The amount of funded support (free to the client) available is calculated by taking into account the income of the organisation, the property issue, the potential impact of our advice, and whether the organisation is able to find support elsewhere.

A Property Adviser will be able to tell you whether you are eligible for grant aided funded support, and if so, the value.

5. What sort of Services does the Foundation provide?

5.1 Information

The Foundation's website provides a comprehensive, free to access and use online resource on a wide variety property issues facing charities and not for profits. It also provides links to relevant resources and publications. Organisations need to register online to gain access to the website.

5.2 Advice

When contacting the Foundation by email or telephone, you will have an initial conversation with one of our Property Advisers, who will establish the issues facing your organisation and advise what we could do to assist. They will advise you whether you are eligible for grant aided support or whether we would need to charge for our advice to you. More complex matters may require a site visit or face to face appointment with an Adviser. The Adviser may also refer you to members of our Register of property professionals, if appropriate.

If we charge you for our advice, you will be informed during your initial conversation with the Foundation. We will agree with you verbally and in writing the terms of our engagement. We will then provide you with a letter of engagement and our standard terms and conditions which govern our relationship with clients who pay for our advice.

5.3 Access to the Register of property professionals

Where an organisation is in need of specific technical expertise, your Property Adviser can refer you to an appropriate property professional. The Foundation operates a Register of property professionals which includes, for example, commercial property surveyors, solicitors, architects, relocation consultants and space planners.

We undertake checks on potential Register members, which include reviewing professional indemnity insurance cover, professional memberships and two references from recent clients. Members joining the Register are experts in the not for profit sector with specific charity experience and are based across the country.

All Register members provide some initial pro bono time and discounted rates to the organisations we refer. Costs, discounts and any pro bono time will depend on the approach of each Register member. This should be established at the beginning of your relationship with a Register member.

Once your Property Adviser has introduced you to a member of the Foundation's Register it is up to your organisation how you take forward the relationship. You will deal directly with the Register member - this relationship is not managed via the Foundation. However, where helpful, your Property Adviser may attend initial meetings between you and the professional, and will want to keep in touch to see how things are going.

The Foundation does not charge for making referrals to our Register of Property Professionals, nor does it receive commission on referrals from Register members.

We expect that you will treat our Register members with respect and courtesy, respond to communications as promptly as possible and provide information they ask for to assist with your issue. Register members save our clients thousands of pounds in professional fees every year, so we ask that you appreciate the value of the service and reflect this in your dealings with our Register professionals. It is vitally important that you ensure you are clear on the extent of the work a professional is able to do for you on a pro bono or reduced fee basis.

5.4 Training and Local Property Events

The Foundation develops and tailors charity focused training events and seminars. We can deliver training in-house for staff, for your member organisations, and provide speakers and workshops for events and conferences as required.

5.5 Larger, long term property projects

The Foundation offers a bespoke consultancy service for charities requiring more in-depth support around specific property issues. For more information on past projects, see our website.

6. Disclaimer

Whilst we make every effort to ensure that the information on our website is accurate and up-to date we cannot guarantee that this will always be the case. Information on the website applies to commercial premises in England and Wales only. The information provided on the website is necessarily brief. You should always take professional advice before signing any document or handing over money. The Foundation assumes no responsibility for linked websites.

The Foundation's property advice team are not property professionals, such as solicitors or surveyors. Property Advisers have backgrounds in property and the charity and voluntary sector and have an understanding of common property problems in the sector. Property Advisers do not provide legal advice. The advice provided by Property Advisers is intended as a suggested approach to overcoming property problems. This is not necessarily the only solution to a specific issue and all suggestions should be carefully considered by the individual organisation and final decisions made at their discretion. Advice is solely for the use of the client organisation and must not be used for any other purpose and is not to be relied upon by, or give rise to any liability on our part in favour of any third party. Advice is based only on information supplied to us. We have no reason to doubt the accuracy of this information, but it is the client organisation's responsibility to provide us with accurate information.

Whilst the Foundation undertakes a number of checks on members of its Register of property professionals, we cannot guarantee, nor are we responsible, for the advice they provide and work they undertake on behalf of client organisations. The decision to commission a professional to carry out any work is that of the client organisation only. The relationship between client organisations and members of the Foundation's Register of property professionals is the responsibility solely of the client organisation.