Virtual Property Inspections

Introduction

Stephanie O'Neill BSc (Hons) MRICS IRRV RICS Registered Valuer - Partner
Stephanie is a partner with Wilks Head and Eve and has been with the partnership for over 17 years and has overall responsibility for managing the rating team. Stephanie has a broad range of rating experience including forensic forecasting of potential losses and reviewing of liability calculations and exemption and reliefs.

In addition to working closely with clients, Stephanie often directly liaises with clients' external auditors. Stephanie has significant experience of income maximisation both through rating and rates retention.

Stephanie is involved in the discussions which are taking place on GPCR on a number of property classes to establish the correct approach to the contractor's basis of valuation including being the lead on particular classes including Schools, Libraries and Leisure.

Stephanie also manages the WHE Revenues Assurance services which provides Billing Authorities with estimates of losses on the Check, Challenge and Appeals as well as increasing yield/rateable value.

Stephanie is a Chartered Member of the Royal Institution of Chartered Surveyors, RICS Registered Valuer and a member of the IRRV.

Why are property inspections needed?

- Generally to obtain information about a specific property

- Has there been any changes, an extension/mezzanine

- Have works that were being undertaken been completed

- Who occupies the property

Needed for various services

- Who is the ratepayer (ensuring correct liability)

- Can a BAR be submitted (increasing yield/rateable value)

Physical Inspection/ Property Inspectors

Are physical inspections needed in the future?

The need for AI in Property Inspection

- Difficulties with resourcing, a lot of properties and not enough resource

- Some information available that doesn't require a physical inspection

- Faster ways to get access to information through various resources
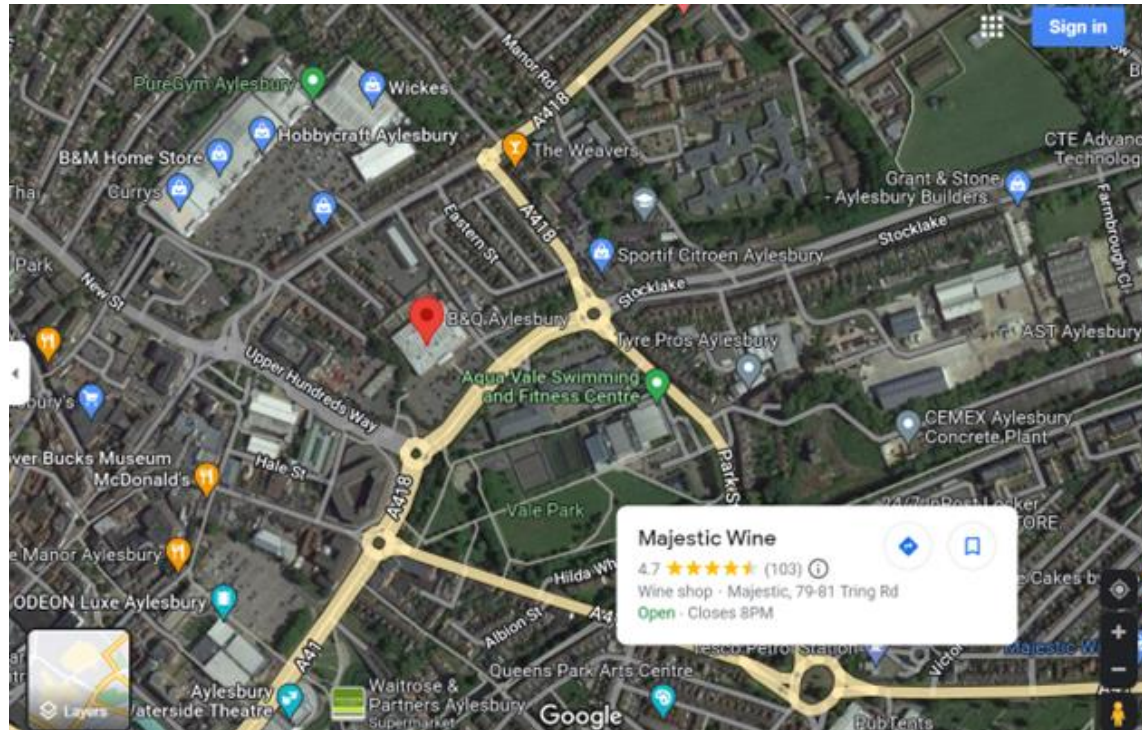
Basic tools for looking at properties virtually

When you don't have access to databases what can you use?

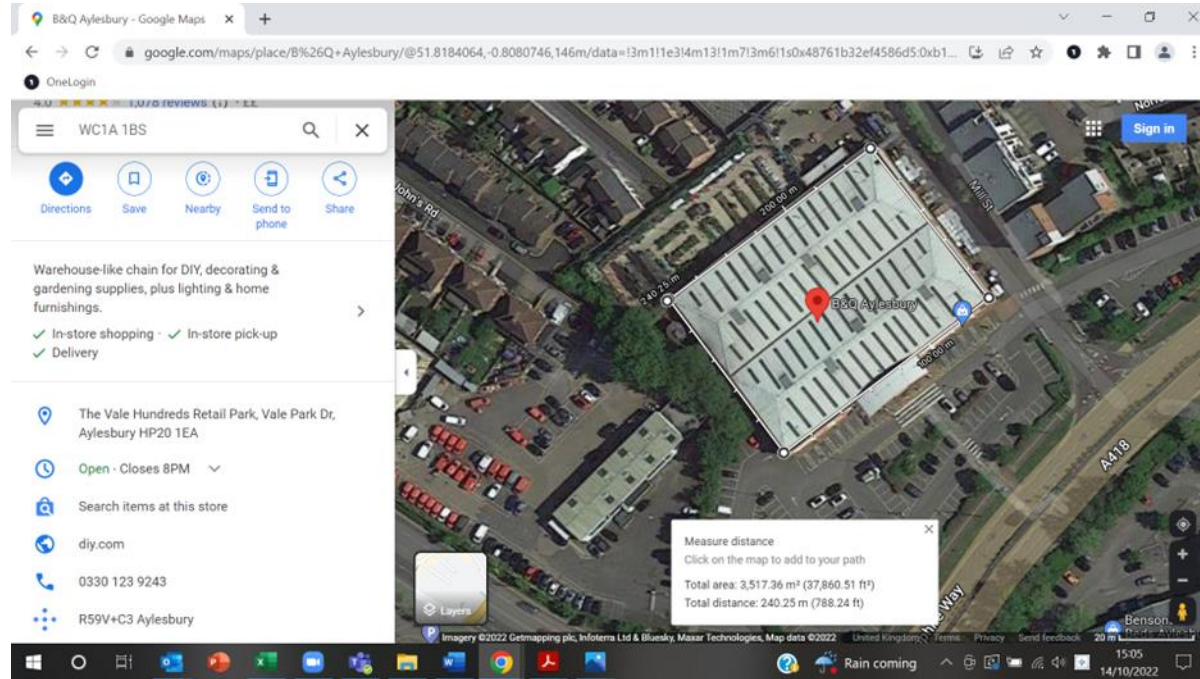Google Maps/Bing/Google Earth/Street View

Basic Tools Continued

Basic Tools Continued

Basic Tools Continued

Basic Tools Continued

Nexus – How does it work?

- Uses data to identify potential mismatches in the rating list

- Creates a useful 'to do list' of properties it has identified as potentially missing

- Council Tax and Business Rates Properties

- Data sets and mapping software combined to make finding properties easier

So how does it work?

Image from October 2019

Property information for
15, FINKEY STREET, OAKHAM, LE15 6AG

Local Authority	Rutland
Local authority reference number	338043000150005
Council Tax band	Deleted
Improvement indicator	No
With effect from	1 October 2019
Mixed-use property	No
Court code	None

- Planning records show extensive refurbishment works which are now completed so should go back into the Council Tax register

- Should it have been deleted in the first place?

WH&E WILKS HEAD & EVE REVENUES ASSURANCE

Nexus – How does it work? Continued

Property
Starbucks Fleet, Cove Road, Fleet, Hants, GU51 2SH

Valuation | Help with current valuation | Similar properties

Valuation

Current rateable value (8 November 2018 to present)
£65,000

Nexus Professional – What's the difference?

- Experienced and knowledgeable rating surveyors that use this as just one of their tools
- Resourcing issues and time consuming
- Nexus gives you the tools but BAR Compliance requires more information
- Billing Authority Reports Submission Standards (2020)

Information required on BAR submission

The following table sets out the information that is required and explains why we need it.

Information required	Why needed
BA Report number	This allows us to cross reference and track reports.
BA Reference number	The unique reference number makes sure we are talking about the same property and we are unable to clear any reports without a BA Reference number.
	We need you to give us BA Reference numbers for existing or proposed new assessments.
	Please provide reference numbers for assessments that have been created from splits or mergers of existing properties in the remarks column, even if one reference number isn't changing.
	Tip - If you have 20 or more reference numbers that require changing, you don't need to submit individual reports. You can you send a spreadsheet to our IT department- itservicedesk@voa.gsi.gov.uk
Property address	Reports for existing properties should include the address as it currently appears in the list.
	Reports for splits or mergers should include details of other properties involved in remarks column.
	Ideally addresses for new properties should be agreed by the Local Authorities Address Custodian to make sure the address is correct and doesn't need a subsequent change.
Postcode	Allows easy identification of the property. We are unable to register reports on our database without a full, correctly formatted postcode.
Description (Not applicable for CT)	Please provide the description as shown in the Rating List for existing assessments or a potential description for new assessments.
	This will help us identify any specialist involvement required and hopefully speed up the clearance of the report for you.
	A full list of descriptions is available on the BA Transfer site under the Tech Circs, appendices to Section 3.

Information required	Why needed
Date of change	This is the effective date of the change. We will use the date you suggest unless a Ratepayer provides supporting evidence for an alternate date or if the effective date regulations require us to set a different date.
	When a completion notice has been served, this will be the date the property has been certified as complete, and will be the effective date.
	FOR NDR - After submitting a report please send us a copy of the completion notice to BARsubmissionstandards@voa.gsi.gov.uk within 24 hours. Please use NDR/completion notice/report number/full address and postcode in the subject line. Please do not send us any copies before the report has been made. We cannot accept effective dates in the future, or 'to be confirmed'.
	FOR CT - We do not require a copy of the completion notice
	FOR NDR - If the effective date is prior to 01-APR-2017 please use 01-APR-2017 and add in remarks what the effective date would have been if there were no restrictions. This will enable us to identify the appropriate transitional certificate if needed.
Coded reason for report	For a list of report code reasons please see Appendix 1 - CT and Appendix 2 - NDR
	Using the correct code means we can allocate reports to make sure they are handled efficiently and effectively by the right people.
	Please only use CR09 for CT reference number and effective date changes.
	If your software does not allow you to use CR05 for Council Tax splits/mergers please use CR03. Please add in remarks "unable to use CR05"
	Please only use the codes that are included in our appendices. Any reports that are made using other codes, such as VO internal codes, will be automatically rejected.
RV or CT Band for existing assessments	The RV or CT Band currently shown in the List.
	Please leave this blank for new properties.
	The Rateable Value or CT band allows us to check a report is registered against the correct assessment, particularly where previous changes to the assessment have taken place.

Information required	Why needed
Plan or Planning Portal Reference	Please provide a planning portal reference or architects plan. This helps us decide if an inspection is necessary. If no plan is available please include one of the following abbreviated phrases in remarks to explain why you have not submitted a planning reference: • built without planning permission – no plan-BWPP • planning not applicable - no plan-PPNA • planning permission not required - no plan-PPNR • permitted development – doesn't need planning permission - no plan-PD • no planning application has been submitted - no plan-NPAS If no plan is available and one of these phrases has not been used, we will take no action on your report.
Reason for Event Remark	Please give us clear remarks as to what change is required We will take no action if you are not sure of the change required, the course of action is unclear/ non-descript or if the change will be at a future date. . Examples of this are – possible new extension, a new business might be running from this address, this property is due to split into 3 parts - please wait until at least one part has been split off before putting in a report. Please send any supporting information, to "BARsubmissionstandards@voa.gsi.gov.uk" Please send a separate email for each report and note in remarks "CT/NDR report-Additional information sent [date]" This will allow us to tie up the information quickly and avoid us having to ask for it to be sent again.
Occupiers name	Please include the occupiers for any new properties formed from splits or mergers. If no occupier is present, please give the name of an owner. This will allow us to contact the current occupier of the property if we need to inspect or to obtain rental information. We know that correspondence is more likely to be opened when served on a named person.
Billing Address	If the billing address is different to the property address. This means that we can send our Notice of Alteration to the correct party.

Information required	Why needed
Contact telephone number	This helps us to contact the occupier quickly to arrange an inspection or to clarify property details. Other contacts and email addresses can be added to the remarks column.
OS grid reference	Allows us to locate the property quickly and easily. Only for properties in rural areas.

Please check the accuracy and relevance of the information you send us as we will rely on it. We will also assume that you have sent us all of the relevant information you hold. Thank you for working with us.

WILKS HEAD & EVE

REVENUES ASSURANCE

RATES RETENTION SERVICES

IDENTIFICATION OF INCREASE IN YIELD/RATEABLE VALUE

Address: Starbucks Fleet, Cove Road, Fleet, Hants, GU51 2SH

BAR COMPLIANCE

Information Required	
BA Report Number	Billing Authority to Complete
Property Address	Starbucks Fleet, Cove Road, Fleet
Postcode	GU51 2SH
Description	Restaurant and Premises
Date of Change	8 November 2018
Coded Reason for Change	01
RV for existing assessment	N/A — new assessment
Plan or Planning Portal Ref	°17/01546/FUL
Reason for event remark	Newly constructed property
Occupiers Name	Starbucks
Billing Address	Starbucks Fleet, Cove Road, Fleet, Hants, GU51 2SH
Contact Phone No	44 (0) 20 3047 2656
OS Grid Reference	

Yes ⦿   No ○

	Total gross new internal floorspace proposed (including changes of use) (square metres)	Net additional gross internal floorspace following development (square metres)
	165.7	165.7
	165.7	165.7

Planning·Application·Floor·Area·Information:-¶

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Full·decision·can·be·found·here:-¶

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https://publicaccess.hart.gov.uk/online-applications/applicationDetails.do?activeTab=documents&keyVal=ORY9D1HZK4B00¶

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Wilks Head & Eve
3rd floor, 55 New Oxford Street, Bloomsbury, London WC1A 1BS

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Description	Area m²/unit	£ per m²/unit	Value ?
Ground floor all main areas	163.12	£400.00	£65,248
Total	**163.12**		**£65,248**

The Future of Property Inspections

- Physical property inspections important

- Using tools/systems to identify potential properties for review are needed

- Errors in the rating list dating back years

- If a listed building becomes re-occupied how do you know?

- So where does this leave us with future developments?

What are we missing?

- Vast amounts of data available

- Lots of mapping software's out there

- Why is it so difficult to identify these changes

- Are there any systems that can use information available to identify changes both new/extensions etc in a way that is easy to analyse

The Future of Property Assessments

• Using mapping overlays to identify changes – taking two separate maps to identify changes

• Using a heat source function to show visually the changes as well as a list of properties that are affected

• The ability to match those to rating assessments to see whether those changes have been actioned in the rating list