

Putting the property management pieces in place

Spring 2010



**TC1 Introduction to Residential Property Management**

- London 23.02.10
- London 27.04.10

**TC21 The Procedural Requirements of Section 20 Consultation**

- London 28.01.10 (am)
- London 20.04.10 (am)

**TC11 Effective Service Charge Accounting**

- London 23.02.10

**TC24 Health and Safety 'Catch up'**

- London 10.03.10

**TC16 The Technicalities of Section 20 in Practice**

- London 28.01.10 (pm)
- London 20.04.10 (pm)

**TC25 Effective Communication, Time Management & other Personal Skills**

- London 30.03.10

**TCX Understanding Residential Property Management - A two day course**

- London 24.02.10/25.02.10
- London 28.04.10/29.04.10

## TC1 INTRODUCTION TO RESIDENTIAL PROPERTY MANAGEMENT

A one day training course providing an overview of residential long leasehold management issues for those new to the sector.

### Understanding the sector

- Terminology and statistics
- The role of the managing agent
- Regulation, Codes of Practice
- Trade and professional bodies
- Customer care

### Financial control

- Service charges and the financial framework for managing residential property

### Who should attend?

This introductory course is primarily for those new to the sector and with less than 6 months experience in residential property management.

### The legal framework

- The lease, its contents and legal issues
- Parties to the lease and assignment
- The role of the residential property manager in disputes
- The Leasehold Valuation Tribunals

### The buildings

- Maintenance responsibilities for long leasehold management
- Consultation on works and long term agreements
- Health & Safety

## TC11 EFFECTIVE SERVICE CHARGE ACCOUNTING

A one day course with interactive sessions which will guide accounts staff and property managers in unison through the accounting procedures required under the terms of the lease and in compliance with all legal requirements. This course is not designed to teach book-keeping but to facilitate the production of "best practice" service charge accounts through the combined efforts, knowledge and understanding of all those who contribute to the end product which should embody accuracy, transparency, explanations and compliance.

### The course covers:

- Corporate - v - service charge accounts - understanding the difference.
- A brief overview of corporate accounts - RMCs, dormant companies, legal requirements, etc.
- Service charge accounts - best practice from budget to year end.
- Management of receipts and payments.
- Procedures for the accurate allocation of costs.
- Production of accounts - lease and legal requirements.
- Explaining service charge accounts - accruals, prepayments, balance sheet.
- Reserve fund expenditure
- Treatment of year end surpluses and deficits
- The chain of responsibility including who signs off the accounts
- Discussion - common problems encountered in presenting accounts to clients and leaseholders

### Who should attend?

This course is designed for accounts staff who need to understand the requirements of lease and law in the production of accounts and property managers whose input is required during the service charge year culminating in service charge accounts presentation/ liaison with their clients. It may also be suitable for senior management who are responsible for the corporate strategy within their accounts department.

## TC16 THE TECHNICALITIES OF SECTION 20 IN PRACTICE

Following the morning seminar (TC21) on the procedural requirements of Sec. 20, this afternoon workshop will look at some of the practical (and often impractical) issues in practice since the inception of the revised Sec. 20 consultation procedure on 31 October 2003.

Some case studies will be examined and the session is designed to be highly interactive. Attendees are welcome to submit any contentious or thorny problems experienced (or about to be experienced). In order to structure the session to the advantage of all, it is asked that specific issues be submitted in advance (by email to [yen@arma.org.uk](mailto:yen@arma.org.uk)) or with the booking form.

### The workshop aims to cover:

- Qualifying Long Term Agreements (QLTAs) – managing agents' contracts, CHP systems, 5 year limit, new developments and public sector partnering regimes
- Private Landlords' Consultation with RSL/Housing Associations in the light of Oakfern -v- Ruddy
- Use of LVT applications for dispensation/Sec 20(1)/20ZA
- The nomination by leaseholders of unsuitable and/or numerous contractors
- Summarising "observations" – how far do you go?
- Choice of contractor, implications of not using the cheapest
- Consequences of non-compliance for managing agents – client management and risk reduction

### Who should attend?

This workshop is most suitable for those managing agents with experience of processing Sec. 20s and advising clients on the requirements and implications. Attendees at the morning session (TC21) may find it useful to increase their knowledge of the practicalities beyond following procedures.

## TC21 THE PROCEDURAL REQUIREMENTS OF SECTION 20 CONSULTATION

This morning seminar is designed to ensure that all attendees gain a firm grasp of the procedures that must be followed, the Notices that must be issued, the "observations" which require summarising – in short, everything which must be done to avoid a flawed Sec. 20 consultation procedure.

### The seminar aims to cover:

- The prescribed Notices
- The sequence of events and timescales
- Minimum requirements and best practice
- "Service" of the Notices/proof of service
- Raising the funds -v- adequate reserve fund

### Who should attend?

This morning seminar is most suitable for property managers or assistant property managers with little experience in Sec. 20 procedures and who would like to gain the confidence to follow the paper trail through the procedure.

## TC24 HEALTH & SAFETY UPDATE - ALL YOU EVER WANTED TO KNOW BUT WERE AFRAID TO ASK!

This one day course incorporates a brief morning session on lifts followed by an overview of the current Health & Safety essential requirements from a practical viewpoint (updating rather than frightening!) in dealing with managed properties. There will be plenty of opportunity for questions and answers but we would ask that specific queries/topics of particular concern from the list below are submitted prior to the course so that the day can be better structured to the advantage of all attending.

### Course Topics:

- LIFTS
- Legal requirements
- Types of lifts
- Key components
- Drive systems and energy efficiency
- Basic guide to standards
- Things to look out for
- Why refurbish a lift

### GENERAL HEALTH & SAFETY:

- Development Fire risk assessment under the 2005 RRFSO
- Health and Safety risk assessment
- Task risk assessment
- Asbestos
- Electrical, Water, Gas
- COSHH
- Lone working
- First aid & Accident Reporting
- Workstations
- Work experience risk assessments
- Essential H & S documentation
- Dealing with a visit from the local enforcer and what happens when things go wrong

And much more.....

### Who should attend?

This course is suitable for property managers who already have some experience of Health & Safety (rather than trainees who have not yet begun to address the many requirements) and who wish to ensure they are covering all the up to date essentials in managing their properties safely.

## TC25 EFFECTIVE COMMUNICATION – AN EXPERIENTIAL PERSONAL SKILLS WORKSHOP

- ✓ Finding it hard to get your message across?
- ✓ Lose your cool when it comes to being assertive?
- ✓ Feel you don't always write what you mean?
- ✓ Want to refresh or develop your communication skills?

### If you ticked any of these questions, you will find this workshop helpful.

Given the volume and complexity of technical knowledge required for good property management, it is easy to overlook the personal skills which can often smooth the path (with clients, customers and employers), increase the ability to work smarter, not harder and encourage greater self-confidence in communicating leading to greater job satisfaction.

### Workshop Aim:

To develop greater personal effectiveness through improved communication skills

### Content:

- To identify strengths and areas for development in spoken communication skills
- To develop effective assertiveness in dealing with customers
- To give and receive constructive feedback as an employee
- To provide some tips on writing more clearly

### Who should attend?

This interactive workshop is a response to all employers who have suggested to ARMA for some time that help with staff personal skills should be addressed in the training courses and for staff who feel that they could benefit from some help in backing up their technical expertise with customer handling proficiency.

## TCX UNDERSTANDING RESIDENTIAL PROPERTY MANAGEMENT - a two day training course

The content and structure of the course has been developed by encompassing important aspects and elements of the one day courses, however please note due to time restrictions these two day events will inevitably be unable to go into as much detail as the one day courses. Therefore, if you would like to study a particular subject in greater depth you may wish to consider attending the one day courses.

### The Legal Framework

- Contract law
- The lease, its contents and legal issues
- The role of the managing agent
- Regulation, Codes of Practice, trade and professional bodies
- Legislative framework and leaseholder rights
- The Leasehold Valuation Tribunals

### Financial control

- Creating a service charge budget
- Reserves and sinking funds, production of accounts
- Managing the service charge account
- Fees of the residential property manager

### Who should attend?

This course is for those with some experience of the residential property management sector or who wish to gain wider or more specific knowledge of the requirements for good and proper management.

### The buildings

- The life cycle of buildings
- Maintenance responsibilities for long leasehold management
- Consultation on works and long term agreements
- Managing contracts

### Health and Safety responsibilities for block managers

- Duty of care
- Risk assessments
- Regulatory framework

## TERMS AND CONDITIONS

Please complete one form per person. The form may be photocopied if additional forms are needed. (PLEASE USE BLOCK CAPITALS). To book please tick the course(s) you want to attend, totalling the cost and add VAT. Then complete all other details at the foot of the form and return it to the address at the bottom together with a cheque (or BACS notification) for the full amount made out to ARMA.

A letter of confirmation and a receipted VAT invoice will be forwarded to you. Further instructions and information will then be issued to delegates nearer the date of the course.

Numbers on these courses are limited, so places will be allocated on first come, first served basis. To be sure of a place, please send in your booking form with payment as soon as possible. ARMA reserves the right to refuse entry.

## LOCATIONS

The courses will be held in locations as shown on the booking form. All courses will be subject to minimum numbers (usually 10) and the maximum number of students will usually be 20.

Where demand dictates, additional courses in the locations may be run.

The courses listed can be booked "in-house" subject to attendee numbers. Please contact Yen Ly at ARMA (yen@arma.org.uk) to discuss this option.

## THE TUTORS

All students will be provided with a participant guide to use as a workbook for the course and as a subsequent reference source. Some courses will be run by experienced trainers and lecturers from Southampton Solent University and some by independent experts in their field.

## CPD

CPD certificates of attendance will be provided to all students on request but attendance carries no other form of recognition.

## HOW TO BOOK...

With this leaflet there is a booking form which needs to be completed separately for each student (please therefore copy the form as needed); if the student is an employee of an ARMA, ARHM or PMAS member or belongs to the IRPM a special discounted rate is available. Bookings will be confirmed and nearer the date of the course full information on attendance will be sent.

## SOME FEEDBACK RECEIVED ON VARIOUS ARMA COURSES :

"I commend ARMA on this course, it really was excellent and certainly sparked a lot of interest with the staff – never seen them so enthusiastic about a training course. Money well spent"

"It was quite open so any time you felt you wanted to contribute, your views were very welcome."

"The course gave me the confidence to embark on a tender for a block management contract and I won!"

"I found the course very informative and worthwhile – I would most certainly recommend this course to my colleagues and I hope to attend more ARMA courses in the future."

"Just to let you know that I thought the course was excellent and I'm really pleased that I went. Every director of an RMC should go on one."

"I would just like to say how extremely good the two day course I have just been on was. It had excellent structure with the ability to discuss real life issues we all face. I would recommend it to others."

"I would like to thank you for a very informative and enjoyable course that I have just attended. I can honestly say that it was the first course I have ever been on that I found 100% useful and actually enjoyable."