

Reach your full potential



ARMA

ASSOCIATION OF RESIDENTIAL
MANAGING AGENTS

Training Courses

Summer 2012

| | | |
|-------------|--|-----------|
| TC1 | Introduction To Residential Property Management | 01 |
| Manchester | 24/05/12 | |
| London | 05/07/12 | |
| TCX | Understanding Residential Property Management - A Two Day Course | 02 |
| London | 18/06/12 & 19/06/12 | |
| TC11 | Residential Service Charge Accounts Guidance (Revised) | 03 |
| Exeter | 10/05/12 | |
| London | 26/06/12 | |
| TC27 | The Procedural & Technical Issues Of S.20 | 04 |
| London | 28/06/12 | |
| TC29 | Property Inspections and Recordings for the Residential Property Manager | 09 |
| Twickenham | 12/06/12 | |
| TC36 | Effective Debt Recovery – half day course | 10 |
| London | 26/06/12 PM | |
| TC37 | Right to Manage – The Practicalities | 11 |
| London | 20/06/12 | |
| TC39 | Reading, Interpreting and Understanding the Implications of Lease Clauses | 12 |
| London | 06/07/12 | |
| TC41 | Managing Mixed Use Developments | 13 |
| London | 21/06/12 | |

VENUES:

Exeter TC11:

The Rougemont by Thistle, Queen Street, Exeter EX4 3SP
T: 01392 312267 W: www.thistle.com/exeter

Manchester TC1:

Mercure Manchester Piccadilly Hotel, Portland Street, Manchester M1 4PH
T: 0844 815 9024 W: www.mercure-manchester-piccadilly.com

Twickenham TC29:

Twickenham Stadium, Rugby House, 200 Whitton Road, Twickenham TC2 7BA
T: 020 8831 7984 W: www.twickenhamexperience.com

All London Courses:

Trafalgar Events Conference Centre, 8-9 Northumberland Street, London WC2N 5DA
T: 020 7766 6660 W: www.trafalgarevents.co.uk

TC1 Introduction to Residential Property Management

Manchester – 24th May 2012 • London – 5th July 2012

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
- 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

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.



TCX Understanding Residential Property Management - A Two Day Course

London – 18th & 19th June 2012

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 & professional bodies
- Legislative framework and leaseholder rights
- The Leasehold Valuation Tribunals

Health & Safety responsibilities for block managers

- Duty of care
- Risk assessments
- Regulatory framework

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

The buildings

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

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.

Book online - www.arma.org.uk/training

TC11 Residential Service Charge Accounts Guidance

Exeter – 10th May 2012 • London – 26th June 2012

The Institute of Chartered Accountants for England and Wales (ICAEWA) have now published their technical release (available on the ARMA website under “Downloadable Publications”) in conjunction with ARMA, the Association of Chartered Certified Accountants (ACCA) and the Royal Institution of Chartered Surveyors (RICS). This one day interactive discussion forum addresses the content of this publication and will guide accounts staff and property managers in unison through the accounting procedures required under the terms of the lease, in compliance with all legal requirements and the practical application of best practice.

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
- The benefits of adopting new articles for RMCos
- Taxation issues in connection with RMCos and with service charge accounts/income.
- Discussion - common problems encountered in presenting accounts to clients and leaseholders

Who should attend?

This forum is not designed to teach book-keeping and is not suitable for relatively inexperienced accounts staff / property managers. It is most relevant to 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.

TC27 The Procedural and Technical Issues of Section 20

London – 28th June 2012

The course is designed to firstly ensure that all attendees gain a firm grasp of the procedures that must be followed to avoid a flawed Sec. 20 consultation procedure. The interactive second session then examines the practical issues which can arise and focuses on the implications of a growing body of Case law.

The course covers:

- When is consultation required?
- The Regulations - 5 variations on a theme!
- Requirements of Notices to satisfy each of the Regulations
- 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
- Qualifying Long Term Agreements (QLTAs)
 - managing agents' contracts
 - CHP systems - 5 year limit
 - new developments and public sector partnering regimes
- Private Landlord's Consultation with RSL/Housing Associations in the light of Oakfern -v- Ruddy
- Use of LVT applications for dispensation/Section 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 day course will suit property managers or assistant property managers with some experience of advising clients of the requirements/implications and processing of Section 20s needing a refresher on (or introduction to) the required procedures and who would also like to address the practical issues/problems/complications which can arise during and after the procedure.

TC29 Property Inspections and Recordings for the Residential Property Manager

Twickenham – 12th June 2012

This one day course will provide you with a basic knowledge of why property inspections form an integral part of the residential management process and place the manager in control of their portfolio. It will also ensure you are aware of the importance of good site inspection records.

It will provide you with:

- Identification of the reasons why inspections are undertaken
- What equipment is necessary in order to complete a satisfactory inspection
- An understanding as to what frequency / timing is required
- What information recording can be completed, the methods used and the “follow up” required after each visit
- How and what to look for (in a simple small block of flats) with a practical “in site” exercise and discussion of YOUR findings afterwards
- When NOT to inspect and when NOT to deliver an “expert opinion

Learning Outcome:

At the end of this course whilst you will not be specially trained to undertake a building or condition survey and you will not become a structural engineer or building surveyor, you will be able to arrange, organise and complete an inspection of a block of flats, recording significant information to use in the ongoing management of the block.”

Who should attend?

This course should be suitable for those relatively new to the sector or perhaps about to take on full responsibility for their own portfolio (it might also be thought provoking for those “set in their ways”).

TC36 Effective Debt Recovery – half-day legal workshop

London – 26th June 2012 (PM)

A half-day interactive workshop, following a light lunch, hosted by specialist service charge debt recovery solicitors and allowing participants to raise specific queries on the legal implications underpinning actions taken and procedures followed.

This workshop will cover:

- Setting the scene in the current economic climate
- The practical importance of good communication
- Pre-action protocols and the implications of lease clauses
- The procedures and timescales for recovery
- Collating and preparing evidence
- Leasehold Valuation Tribunal
- Legal costs/recovery of costs/taxation of costs
- Case study discussion

Who should attend?

This workshop is suitable for all professionals within the field of property management to whom the responsibility falls to advise clients in determining when to pursue unpaid service charges and whether to retain legal services.



TC37 Right to Manage – The Practicalities

London – 20th June 2012

[Justin Bates, Barrister, Arden Chambers and Neil Maloney, Chartered Surveyor]

This one day course, whilst not intending to focus in detail on the prescribed procedures and timescales which must be followed to achieve Right To Manage (only giving an overview of these and the background leading to the right being introduced), will address the advice given by property managers on (i) initial considerations in the setting up of RTM and (ii) the exercising of RTM rights and (iii) the management functions and responsibilities of the RTM Company where a potential client is contemplating or has achieved RTM, or the client is the freeholder handing over to an RTMco.

Course content:

- Background and legislation to RTM
- Initial considerations in going RTM
- Preparation, exercise and taking over from the landlord
- Management functions
 - What is included
 - Management Contracts
 - Insurance
 - What is NOT included
 - Mixed use properties
 - Forfeiture and possession
 - Non-qualifying flats
- Managing the estate containing a RTMco
- What happens if a RTMco gets struck off
- RTM problem solving

Who should attend?

This course is of general interest but may not suit the inexperienced property manager. It will especially suit those wishing to expand their existing expertise and assist RMC/investor clients having to deal with Right To Manage claims or those who have just taken their first RTM instructions.

TC39 Reading, Interpreting, and Understanding the Implications of Lease Clauses

London – 6th July 2012

A one day interactive course in learning to read leases constructively, gleaning the essential knowledge to format a “bible” for each managed property, understanding the implications for property managers of these often weird and wonderful clauses drafted in “legalese”.

The course covers:

- Who are the parties, how many parties are there
- Who is the client – for ground rent, for service charges
- The “demise” – what is it
- Windows – whose responsibility
- External decorations, internal decorations
- Forced entry – the client’s rights
- Interest on late payment – can it be levied
- Service charges to be treated as rent – the implications
- Reserve funds – allowable or not
- Period of grace for payment
- Mutual enforceability
- Indemnity required for Landlord’s enforcement in leaseholder disputes
- Landlord’s consent to assign or sub-let
- Case studies on what can go wrong
- Breakout interactive sessions

Who should attend?

This course is for the relatively inexperienced who have some knowledge of the legal framework governing residential long leasehold management but who need to become familiar with the essential information needed to safely and efficiently assist or manage a portfolio.

Book online - www.arma.org.uk/training

TC41 - Managing Mixed Use Developments

London – 21st June 2012

This one day course is based around the RICS Guidance Note on Managing Mixed Use Developments and is presented by Peter and Jeff. The practical difficulties imposed by the different statutory and regulatory regimes for commercial and residential property are examined. The course approach assumes a hypothetical development of mainly residential (leasehold flats and freehold houses) and commercial units (shops and offices) with shared elements where the Landlord has appointed one agent to manage all.

Tutors:

Peter Forrester, MRICS - Director: Service Charge Consultancy Savills (co-author of "Residential & Commercial Service Charges" and lead technical author for the RICS Code of Practice for service charges in commercial property)

Jeff Platt, BSc Est Man, FRICS, FIRPM - M.D. Sec20 Ltd, CEO IRPM (author of the RICS Guidance on Managing Mixed Use Developments)

"Residential and commercial management – an excellent knowledge of one does not imply a competence to handle the other"

Course topics include:

- The respective legal frameworks - common core principles and differences
- The legal structure – residential, affordable, commercial
- Allocation and apportionment
- Landlord & Tenant Act 1954, FRI leases, rack rentals, rent reviews/renewals – record keeping
- VAT - Landlord's election to waive exemption, utilities and shared areas
- Service Charge Accounts and certification
- Consultation communication and transparency
- Repairs, improvements and refurbishments
- Sinking and Reserve Funds
- Commercialisation
- Management Fees
- Commercial - Rubbish collection, delivery times, parking
- Right to challenge/dispute resolution
- RTM

Who should attend?

This course is for experienced residential property managers who have little/no experience of managing commercial property or mixed use estates and, given the recent Government driven increase in such developments, need to ensure their knowledge spans both elements when tendering for or taking on such a management.

How To Book

With this leaflet there is a booking form which needs to be completed separately for each student. If the attendee is an employee of an ARMA member or belongs to the IRPM (AIRPM, MIRPM or FIRPM) a special discounted rate is available.

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 a 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.

Alternatively you may wish to book online. Visit www.arma.org.uk/training

Terms and Conditions

ARMA reserves the right at any time and without prior notice to change the venue and date of any course and/or tutors and/or the contents of the programme from those described in this leaflet.

ARMA Cancellation

ARMA reserves the right to cancel courses where circumstances dictate no alternative course of action i.e lack of interest, tutor unable to attend due to illness etc. Where a course is cancelled in such circumstances participants will be transferred to the next available date. If no such date is available or a participant is unable to attend the date offered, then a refund of course fees will be made and ARMA will accept no further liability.

Attendee Cancellation

We regret that unless cancellations are received in writing 14 days prior to the event, course fees cannot be refunded*. Substitutions may be made without penalty but must be received in writing prior to the event.

Attendees should note that any technical or legal content is of necessity a general overview of the position. As a result, if acting on course material, it is essential that further research is carried out to ensure that it is appropriate for any given specific situation.

*Where funds are not received by the date of the course and the attendee does not attend he/she will still be liable to pay the outstanding balance.

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 25. 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.

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.

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Company limited by Guarantee. Registered in England No. 5128635 at the above address. VAT Number: 707 3118 58

**Please detach booking form, complete and send
back to:**

**Yen Ly
ARMA
178 Battersea Park Road
London
SW11 4ND**

**or fax back
020 7498 6153**

You can also book online

Visit:

www.arma.org.uk/training



Training Courses - Booking Form

| Code | Location | Time | Date | ✓ |
|------|------------|--------------|---------------------|--------------------------|
| TC1 | Manchester | Full Day | 24/05/12 | <input type="checkbox"/> |
| TC1 | London | Full Day | 05/07/12 | <input type="checkbox"/> |
| TCX | London | 2 Day course | 18/06/12 & 19/06/12 | <input type="checkbox"/> |
| TC11 | Exeter | Full Day | 10/05/12 | <input type="checkbox"/> |
| TC11 | London | Full Day | 26/06/12 | <input type="checkbox"/> |
| TC27 | London | Full Day | 28/06/12 | <input type="checkbox"/> |
| TC29 | Twickenham | Full Day | 12/06/12 | <input type="checkbox"/> |
| TC36 | London | Half Day | 26/06/12pm | <input type="checkbox"/> |
| TC37 | London | Full Day | 20/06/12 | <input type="checkbox"/> |
| TC39 | London | Full Day | 06/07/12 | <input type="checkbox"/> |
| TC41 | London | Full Day | 21/06/12 | <input type="checkbox"/> |

NB. By necessity, there will be an element of repetition in the TC1 and TCX courses as both cover the essential knowledge / skills that a property manager needs.

Full day courses generally start at 9.45am with registration and morning refreshments at 9.15am; the course will finish at approx 5pm.
Venues:

Exeter TC11: The Rougemont by Thistle, Queen Street, Exeter EX4 3SP T: 01392 312267 W: www.thistle.com/exeter

Manchester TC1: Mercure Manchester Piccadilly Hotel, Portland Street, Manchester M1 4PH

T: 0844 815 9024 W: www.mercure-manchester-piccadilly.com

Twickenham TC29: Twickenham Stadium, Rugby House, 200 Whitton Road, Twickenham TC2 7BA

T: 020 8831 7984 W: www.twickenhamexperience.com

All London Courses: Trafalgar Events Conference Centre, 8-9 Northumberland Street, London WC2N 5DA

T: 020 7766 6660 W: www.trafalgarevents.co.uk

You can now make bookings online - www.arma.org.uk/training.

FEE:

My Company is a member of ARMA

I am a member of IRPM (please tick)

(only AIRPM, MIRPM and FIRPM are entitled to the discounted rate)

1 day courses £185 + VAT, 2 day courses £360 + VAT

Half day course £110 + VAT

Non-Members

1 day courses £260 + VAT, 2 day courses £510 + VAT, Half day course £160 + VAT

Total

Net Cost: £

VAT

@ 20%: £

Total Cost: £

| | | |
|----------------------|-------|-----------|
| Title: | Name: | |
| Surname: | Qual: | |
| Job Title: | | |
| Firm / Organisation: | | |
| Nature of Business: | | |
| Address: | | |
| | | |
| | | Postcode: |
| Telephone: | Fax: | |
| Email*: | | |

Please tick:

Cheque enclosed (made payable to ARMA)

Paying by BACS (see below for account details)

Please send an invoice

CPD Certificate required

Vegetarian

PLEASE SEE ARMA TRAINING COURSE LEAFLET FOR TERMS AND CONDITIONS.

In submitting this booking form I confirm I have read the course content and the course(s) booked is/are suitable for my purposes.

Please make cheques payable to ARMA and send them together with this form to:

Bank details for those wishing to pay by BACS:

ARMA, 178 Battersea Park Road
London, SW11 4ND
T: 020 7622 6123
F: 020 7498 6153
E: yen@arma.org.uk

Account Name: The Association of Residential Managing Agents Ltd
Bank: Royal Bank of Scotland PLC
Branch: London Piccadilly Circus
Sort Code: 16-00-83
Account No.: 00104542

Note: All information will now be e-mailed to delegates; please ensure this field is completed.