

CONSULTANCY SERVICES

Detailed below is a summary of the range of consultancy services we are able to provide.

Compliance

Within this field of work there is an increasing raft of statutory and regulatory obligations, comprising, but not restricted to the following:

- Trust fund law.
- RICS client monies and general conduct regulations.
- Health and Safety requirements.
- Landlord and Tenant Act Legislation.
- Commonhold and Leasehold Reform Act.
- Section 106 Planning Agreements.

We are able to provide advice to ensure compliance at pre-completion stages and continued compliance should our services be retained to manage the development post completion.

In addition we are able to review the Operation and Maintenance manuals prior to formal handover and provide recommendations for format etc to ensure they are user friendly and include appropriate documentation. We will also ensure these manuals are thoroughly reviewed to ascertain warranty and maintenance conditions.



Design for Management

We believe this is an essential feature, which aims to optimise the efficiency of designs from a management perspective, whilst minimising future maintenance / service charge costs.

By engaging in the design process through reviewing plans, strategies and working with design and technical teams, we are able to provide advice and recommendations based on our experience of best practice and restrictive design, in order that potential management issues can be “designed out” and thereby dispensing with the need for expensive retrofits.

We are therefore able to undertake the following:

- Review of strategies – refuse, window cleaning, external façade cleaning, fire and security and provide advice on the resultant impact on service charges and day to day to management.
- Advise on storage for management purposes.
- Review the extent and treatment of mechanical and electrical plant.
- Review utility provisions.
- Advise on metering arrangements.
- Advise on appropriate staff management and welfare facilities.
- Review the design of internal and external common areas, including areas of public realm.



Ownership Structure and Exit Strategies

An essential task in the set up of any scheme is to create an ownership structure which is appropriate and relevant, in order to ensure:

- Compliance with any Section 106 Planning requirements.
- Asset values are maximised.
- Long term management issues are considered.
- Exit strategies are developed.

We can therefore work with developers and their appointed solicitors, provide recommendations and set out the various implications.

Service Charge

The development of the service charge for a scheme is formed by consideration and review of:

- **Structure:**
This will depend on the nature of the development; the different types of lessees i.e. private residential, affordable and commercial; the construction of the development and the type and accessibility to services being offered.

- **Marketing:**
To achieve an appropriate level of service charge, there needs to be an understanding of what is being marketed and the expectations of the client and the prospective purchasers being targeted.

- **Services:**
By understanding the extent of equipment and strategies proposed for the development, appropriate provisions can be made.

By working with developers and their appointed specialist consultants during the design process, a clear understanding of the development can be achieved, which is essential to the preparation of an accurate development specific service charge.

To facilitate this process, we have also developed a comprehensive "development checklist" which details the information we would need to consider. A copy is attached.



Lease Reviews

To enable a development to be managed efficiently and effectively it is essential for the lease to be appropriately drafted and development specific. Therefore we can review leases and work with your appointed solicitors to provide advice on the following:

- Service Charge Structure.
- Inclusion of relevant clauses relating to management issues, for example in respect of subletting, alterations, noise nuisance, repairing obligations, etc.
- Repairing and maintenance obligations.

Where a development comprises of commercial premises, we will also review these leases to ensure they:

- Mirror the residential leases to create uniformity and deter conflict.
- Are required to contribute to relevant service charge provisions.
- Operating covenants such as trading hours, licenses for use of terraces etc are appropriate to the development and use type.
- Make provision for weighting or direct charging as appropriate.

Phasing of Services

Phasing of services, e.g. staffing, is often necessary, particularly where there are long build programmes in order to optimise the use of resources, minimise void service charge liabilities and incorporate construction restrictions e.g. temporary staff facilities.

We are therefore able to prepare phasing strategies, which will ensure the following:

- Informed decisions about phased provision of services can be made.
- The strategies can be circulated to all relevant parties to ensure everyone is aware of the agreed services.
- Marketing material to prospective purchasers can be appropriately worded to prevent misrepresentation.

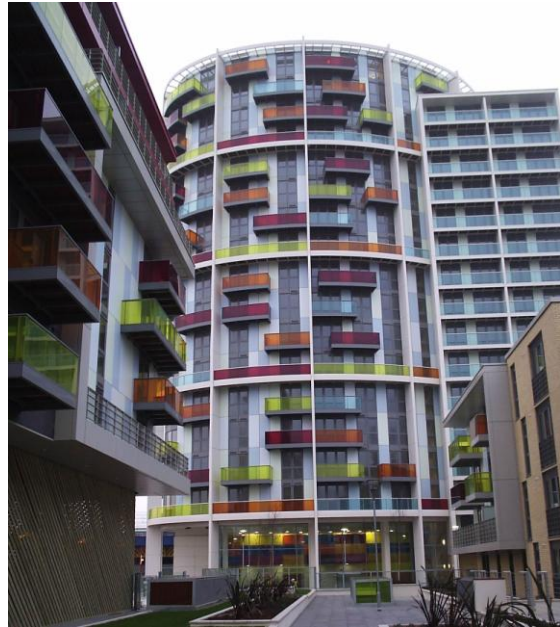
Set Up Cost Schedule

There are certain items which would initially be expected to be purchased by the developer, such as the first set of uniforms and office furniture. We can therefore prepare a site specific schedule detailing these items to allow appropriate budget provision to be made.

Review of Section 106 Planning Agreements.

The obligations placed upon landlords have increasingly become more onerous in order to achieve Central and Local Government targets in a variety areas including:

- Affordability - Service charge cappings or confirmation that service charges have been minimised.
- Sustainable Communities - this vast topic can include energy generation requirements for example Combined Heat and Power plants, local employment initiatives and requirements to produce and update annually green travel plans or provide car clubs.
- Art Strategies
- Provision of play areas
- Contributions to other facilities e.g to the local authority for remote monitoring of CCTV.



As these may have service charge, management or design implications it is essential for such agreements to be reviewed in order that the obligations are reflected in the service charge, the leases and development strategies etc.

Liaison with Appointed Registered Social Landlords

For a large majority of schemes, RSLs form an intrinsic part of the development's partnership arrangements and therefore it is essential that they understand the nature of the development, the various strategies and the core services and costs that they will be required to "buy into". To assist this process, we are able to represent the service charge estimates for RSLs to be consistent with Housing Corporation funding and affordability criteria.

By working with RSLs during the development process, an important relationship is established, creating a flow of information and an understanding of the various needs of all parties involved, which will facilitate efficient management of the scheme.

Staffing Strategies

Every development will require an individual staff strategy based the nature of the development and consequently these will range from no on site staff, with contract services being provided, to a team of people providing services 24 hours a day, 7 days a week.

As staffing and or contracted services are likely to be the single most expensive service charge item within an estimate, it is essential to ensure an appropriate balance is found between the expectation of clients and their purchasers in terms of staff levels and service charge costs.

We can therefore prepare staffing strategies incorporating staff numbers, structure and functions and advise on the service charge implications of various options. We will also look at the overlap between shared and private building functions and any car park, in order that costs are appropriately apportioned.

Where on site staff are proposed, we can also provide advice and recommendations in the following areas:

- Staff Facilities – This will incorporate required “front of house” facilities in terms of reception and desk design; management storage and staff welfare facilities.
- Staff Uniforms – The appearance of staff is important to the presentation and marketing of a development. We are able to provide advice and arrange samples for a variety of uniform options, which will meet the aspirations of the client, comply with Health and Safety and be suitable for the variety of tasks the staff will undertake.



- Employment of staff – The employer of the staff will vary from site to site depending of the legal structure. We can therefore provide advice on the options available, cost implications such as VAT issues and licensing requirements.
- Training and Development - We acknowledge that the performance of the on site staff has a pivotal impact on the presentation and maintenance of the development. Consequently we place a high priority on training and staff development. Therefore we believe it is essential to appropriately equip and provide staff with the following:
 - a) **A development specific procedure manual.**

This document will incorporate procedures based on the Operations and Maintenance manuals for the site, emergency procedures and performance of routine duties. They will be written in plain English and in a step by step format with pictures and diagrams to ensure they can be easily understood both by existing and temporary staff.
 - b) **An individualised training programme for staff, comprising of:**
 - Customer Service.
 - Policies and procedures. This will be based on the development specific procedure manual. Staff will be encouraged to provide feedback and comment on the procedures to ensure that they “buy into” them and understand their importance and relevance. Subsequently where appropriate, these will be amended, to incorporate their hands on experience to ensure they are practical and efficient.
 - Health and Safety.
 - First Aid.
 - Appraisal training for site managers (where appropriate).

Void Service Charge Assessments

Void service charges form a substantial liability for developers, which in our experience, are often not budgeted for. We are therefore able to facilitate the management of these in the following ways:

- Provide advice on how to minimise void service charges.
- Undertake an assessment of void charges.
- Raise awareness regarding void liabilities.

Handbooks for Residents and Commercial Tenants

We understand the importance of clear and effective communication and consequently we have experience of reviewing handbooks / operating guidelines and preparing appropriate inserts, for residents and commercial tenants in order to provide information on the day to day operation of the development.

Moving in Strategies

The moving in date is a very special day for all parties involved and therefore it is important for it to be appropriately managed and organised. We are therefore able to work in conjunction with developers to create a workable and documented strategy.

Development Specific Strategies.

As a result of our experience of dealing with complex and unique developments, we are able to provide advice on the management implications on a wide variety of issues for example:

- Car clubs.
- Travel plans.
- Community rooms.
- Dock / Marina maintenance.
- Disaster recovery plans.
- Emergency procedures where developments are adjacent to Critical National Infrastructure sites.
- Strategies for promoting flora and fauna.
- Developing crime prevention initiatives.

