

## All You Want to Know About Service Charges in Social Housing in Wales

February 2018

We are holding our seminar on 'All You Want to Know about Service Charges in Social Housing in Wales' in Cardiff on 14<sup>th</sup> February 2018. This seminar is designed to give an introduction and overview to this important subject and is fully up to date.

Service charges are an integral part of landlords' work in financing value for money services and sustaining customer satisfaction. They have always been relatively complex but with increased financial challenges and legal and financial complexity there is an increased need to understand how service charging works.

Traditional Housing Associations have usually levied service charges but most local authorities and stock transfer associations in Wales have usually 'pooled' their service costs. However, local authorities and stock transfer associations have recently introduced service charges as part of the Welsh government's new rent policy. The rolling out of Universal Credit is having an impact on benefit entitlement for service charges.

This seminar is suitable for people who are not experts in service charges, but who need to understand the basics and achieve an overview of what is going on. It is suitable for councillors, board members, housing managers, legal staff, finance staff, tenant representatives, members of the service charges team with limited experience and others who realise that an understanding of service charges can place them at an advantage!

### What the Session Covers:

- How do Service Charges work in Housing Associations and Local Authorities and for Leaseholders and Tenants?
- How are service charges calculated?
- How to de-pool service charges?
- Legal obligations, accounting guidance and good practice
- When are service charges eligible for housing benefit / universal credit?
- How to ensure excellent customer service?

The sessions are accompanied by a very useful 100-page book that is designed for reference after the session entitled: **"All You Want to Know about Service Charges in Social Housing in Wales 2018"**

**Venue and Date:** Novotel Hotel, Cardiff – 14<sup>th</sup> February 2018

This seminar is also available in-house. For further information about in-house sessions, please contact Adrian Waite on 017683-51498 or [adrian.waite@awics.co.uk](mailto:adrian.waite@awics.co.uk)



County Hall at Cardiff.  
Cardiff City Council is one of the largest landlords in Wales.

## **The Programme**

### **10.00 How do service charges work in housing associations and local authorities and for leaseholders and tenants?**

Differences in approach between housing associations and local authorities; Financial context of local authorities and housing associations; Service charges for revenue and capital costs; Service charges for tenants and leaseholders; Consultation requirements especially for capital works; Guidance of the Welsh Government.

### **11.00 BREAK**

### **11.15 How are service charges calculated?**

What should go into a service charge? Calculation of direct costs; Calculation of indirect costs and overheads, including administration; Depreciation; Apportionment and allocation of costs; Designing-out service charges; Service charges in supported housing; Fixed and variable service charges; Service charge accounts; How to ensure that service costs are fully recovered.

### **12.15 How to de-pool service charges?**

De-pooling service charges in local authorities and stock-transfer associations; the guidance on de-pooling service charges in Wales; Alternative approaches to de-pooling; Affordability issues for tenants who do not receive housing benefit.

### **12.30 LUNCH**

### **13.30 Service Charges in Supported Housing and Eligibility of Service Charges for Housing Benefit and Universal Credit**

Service Charges in Supported Housing (including the United Kingdom government's proposals for changes to funding mechanisms); Service charges that are eligible for housing benefit; Service charges that are not eligible for housing benefit; Supporting People and service charges; the impact of Universal Credit on service charges.

### **14.45 BREAK**

### **15.00 Service Charge issues and how to ensure excellent customer service**

Legislation and case law regarding service charges; Leases and tenancy agreements; the Residential Property Tribunal; Accounting Guidance; Good Practice; Value for money; Minimising service charges to drive affordability for customers; Consultation with tenants and leaseholders; Considering the management and delivery of effective services; Providing the right information at the right time – ensuring transparency; Common service charge issues.

### **16.00 CLOSE**



**Adrian Waite (Independent Consultancy Services) Limited**

**Our speaker **Adrian Waite** is well known for his in-depth knowledge of this subject and for his ability to present information clearly.**

Adrian Waite is Managing Director of 'Adrian Waite (Independent Consultancy Services) Limited'.

Adrian is known for his expert knowledge of financial and management issues that affect Welsh social housing and his ability to explain complex matters in a clear and understandable manner. He provides training and consultancy on all aspects of the finance and management of social housing. He is a former Chair of the Board of Impact Housing Association; a former member of the Board of Calico Housing Association; a former local authority Chief Officer and a former member of the National Council and Housing Panel of the Chartered Institute of Public Finance & Accountancy (CIPFA).

Adrian's recent work has included: Assisting local authorities and housing associations with the de-pooling of service charges; Reviewing leaseholder and tenant service charges; Assisting Welsh local authorities with the introduction of self-financing; Providing Training for Local Government and Housing Associations on service charges, housing finance and welfare reform; Preparing Business Cases and Business Plans for Housing Association mergers; Reviewing Value for Money in Housing Associations; Carrying out and Evaluating Housing Stock Options Appraisals; Preparing Housing Revenue Account Business Plans; Developing Procurement and Value for Money Strategies; Financial Modelling of New Build schemes; Preparing postgraduate course materials for a University; acting as an Independent Tenants' & Residents' Advisor and acting as an expert witness in judicial reviews of council budgets. He is therefore well placed to explain Welsh social housing finance including service charges as it is seen in Local Government, Housing Associations and among Tenants.

After graduating from Oxford University with a First-Class Honours degree, Adrian joined West Yorkshire Metropolitan County Council as a Trainee Accountant, and became a qualified member of CIPFA. He is also an Associate member of the Chartered Institute of Housing and a Fellow of the Institute of Leadership & Management. Appointments at Leeds City Council and Newcastle on Tyne City Council gave him experience of the finance of every local government service. In 1990, he was appointed Assistant County Treasurer at Staffordshire County Council. As Finance Director, and then Strategic Director, at Copeland Borough Council between 1993 and 1998, he became conversant with every aspect of the finance and strategic management of housing.

### **About 'AWICS'**

'AWICS' is a management advice and training company. We specialise in providing support in finance and management to clients in housing and local government. We are well known for our ability to analyse and explain complex financial and management issues clearly. Our mission statement is 'Independence, Integrity, Value'. We therefore provide training from an independent standpoint that is designed to help the client to achieve their objectives. We are passionate about working with the utmost integrity. We believe that we offer the best value for money that is available today! We are big enough to make a difference – but are small enough to care!

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Adrian Waite (Independent Consultancy Services) Limited

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### How to reserve your place

- **On line:** You can book online at: <http://awics.co.uk/all-you-want-to-know-about-service-charges-in-social-housing-in-wales-2018>
- **On line:** You can down load this form from: <http://awics.co.uk/all-you-want-to-know-about-service-charges-in-social-housing-in-wales-2018> fill it in electronically and forward to: [orders@awics.co.uk](mailto:orders@awics.co.uk)
- **By post:** Complete this form and send it to: AWICS Ltd, PO Box 17, Appleby in Westmorland, Cumbria. CA16 6YL.

**Payment:** It is possible to pay online at the time of booking. In the case of customers with an existing account, public bodies and housing associations we are happy to confirm your booking and send an invoice.

### Delegate fees:

The cost of the session is £195 plus VAT making a total of £234. **However, there is a £20 discount for people who book a month or more in advance** making the cost £175 plus VAT making a total of £210. The fee includes lunch\* and book – ‘All you Want to Know about Service Charges in Social Housing in Wales 2018’.

Delegate Name                      Position and Organisation

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To enrol additional delegates, please photocopy this form.

Please state which venue and date you require \_\_\_\_\_

Name of person booking \_\_\_\_\_ Tel.No. \_\_\_\_\_

Dept and Organisation \_\_\_\_\_ Order No. \_\_\_\_\_

Full Address \_\_\_\_\_

\_\_\_\_\_

Post Code \_\_\_\_\_ E-mail address: \_\_\_\_\_

Please advise us if you would like your invoice sending to a different address or if your delegate has any particular needs including any particular dietary requirements.

### Booking conditions:

**Cancellations and substitutions:** A full refund will be given up to 28 days before the seminar. There after a 50% refund up to 14 days before the seminar. We regret that no refund can be given 14 days or less before the seminar.

Cancellations must be made in writing or by email and be acknowledged by AWICS. No refund will be given for non-attendance, but delegates may substitute another delegate at any time.

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