

## All You Want to Know About Service Charges in Social Housing 2019

February, June & October 2019

We are holding our 2019 series of seminars on 'All You Want to Know about Service Charges in Social Housing' between February and October 2019. This seminar is designed to give an introduction and overview to this important subject and is fully up to date with all developments.

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.

Housing Associations have traditionally levied service charges with most local authorities in England introducing them in the 'noughties'. Financial constraints and proposals for the future funding of supported housing are leading many local authorities and housing associations to look at reviewing their approach to service charges. It appears from the global accounts of registered providers that most housing associations are under-recovering service charges by about 20% and the situation in local authorities is similar. 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 people including councillors, board members, housing managers, legal staff, finance staff, tenant representatives and members of the service charges team with limited experience!

### 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?
- When are service charges eligible for housing benefit / universal credit?
- Service Charges in Supported Housing
- Service Charge issues and how to ensure excellent customer service?

The session is 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 2019"**

### Venues and Dates:

**London:** Novotel Hotel, Waterloo – 12<sup>th</sup> February 2019

**North:** Novotel Hotel, Leeds – 4<sup>th</sup> June 2019

**London:** Novotel Hotel, Waterloo – 1st October 2019



**A Sheltered Housing scheme where services are funded through service charges - Abbeyfield, Solihull.**

## **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; Homes England Rent Standard; Service charges for revenue and capital costs; Service charges for tenants and leaseholders; Tenancies and Leases; First Tier (Property) Tribunal; Consultation requirements especially for capital works; the impact of the rent reductions from 2016 to 2019; Reserve Accounts and Sinking Funds.

### **11.00 BREAK**

### **11.15 How are service charges calculated, how to de-pool Service Charges and Case Studies**

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. De-pooling service charges in local authorities and housing associations; Reviewing existing Service Charges; Affordability issues; Case Studies.

### **12.30 LUNCH**

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

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; Service Charges in Supported Housing; the implications of the government's proposals for the future funding of Supported Housing; Intensive Housing Management; Estate Charges.

### **14.30 BREAK**

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

Legislation and case law regarding service charges; Leases and tenancy agreements; the First Tier Tribunal (Property Chamber) and recent cases; Good Practice; Taxation; Value for money; Benchmarking; Minimising service charges to drive affordability for customers; Consultation with tenants and leaseholders; Providing the right information at the right time – ensuring transparency; Common service charge issues.

### **16.00 CLOSE**

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)



**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'. He is a qualified member of the Chartered Institute of Public Finance and Accountancy (CIPFA), an Associate member of the Chartered Institute of Housing and a Fellow of the Institute of Leadership & Management.

Adrian is a former member of the CIPFA National Council and the Housing Panel. He was a member of the working party on funding mechanisms that was part of the Communities & Local Government (CLG) and Treasury review of the financing of the Housing Revenue Account. He is a former Chair of Impact Housing Association and a former Board member at Calico Housing Association.

Adrian's recent work has included calculating, introducing and reviewing leaseholder and tenant service charges for local authority and housing association landlords; speaking at conferences on service charges for the National Housing Federation; providing in-house training for elected members, board members and officers for local authorities, housing associations and the Homes & Communities Agency; preparing business plans as part of business cases for housing association mergers; preparing housing business plans and financial 'health checks' of housing accounts; developing procurement and value for money strategies; preparing financial diagnostic reports for the Local Government Association in advance of peer reviews; preparing expert witness reports for judicial reviews; reviewing complaints policies and procedures; establishing new housing associations and acting as an Associate Housing Inspector and Independent Tenants' and Residents' Advisor. He is therefore well placed to explain service charges as they are seen in central and local government and housing associations and their impact on tenants and leaseholders.

After graduating from Oxford University with a First-Class Honours degree, Adrian joined West Yorkshire County Council as a Trainee Accountant. Appointments at Leeds City Council and Newcastle on Tyne City Council followed. 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, Adrian became conversant with every aspect of the finance and strategic management of housing. He left Copeland Council in 1998 to work as an Independent Management Advisor. Since then he has worked with central government, local authorities, housing associations and tenants' associations on a variety of financial and strategic issues that affect 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

## All You Want to Know About Service Charges in Social Housing 2019

### 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-2019>
- **On line:** You can download this form from, <http://awics.co.uk/all-you-want-to-know-about-service-charges-in-social-housing-2019> 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 this seminar in London is £260 plus VAT making a total of £312. **However, there is a £20 discount for people who book a month or more in advance making the cost £240 plus VAT making a total of £288.** The cost of this seminar in Leeds is £210 plus VAT making a total of £252. **However, there is a £20 discount for people who book a month or more in advance making the cost £190 plus VAT making a total of £228.** The fee includes lunch\* and book – ‘All you Want to Know about Service Charges in Social Housing 2019’.

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 let us know if your delegate has any particular needs.

### 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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