

## All You Want to Know About Service Charges in Social Housing 2016

### September to November 2016

We are holding seminars on 'All You Want to Know about Service Charges in Social Housing' in September and November. These seminars are designed to give an introduction and overview to this important subject and are 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.



**Flats at Wornington Green,  
Kensington, London.**

Housing Associations have traditionally levied service charges with most local authorities in England introducing them in the 'noughties'. The rolling out of Universal Credit is having an impact on benefit entitlement for service charges.

These seminars are 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 Sessions Cover:

- 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 2016"**

**Venues and Dates:**                   **London:** Novotel Hotel, Waterloo – 13<sup>th</sup> September 2016  
  **North:** Novotel Hotel, Leeds – 8<sup>th</sup> November 2016

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)

## **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; the impact of the Welfare Reform and Work Act and the rent reductions from 2016 to 2019; Government Guidance.

### **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.

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

De-pooling service charges in local authorities and housing associations; the guidance on de-pooling service charges; 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; 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 capping housing benefit and local housing allowance rates; 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 First Tier Tribunal (Property Chamber) and recent cases; 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'. 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 landlords – most recently for Calico Housing Association, Denbighshire County Council, Northampton Borough Council and Oldham Borough Council; reviewing leaseholder service charges at Thamesmead for Teresa Pearce MP; speaking at conferences on service charges for the National Housing Federation; providing in-house training for elected members, board members and officers; evaluating the impact of self financing; carrying out and evaluating housing stock options appraisals; preparing housing business plans and financial 'health checks' of housing accounts; developing procurement and value for money strategies; preparing expert witness reports for judicial reviews 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 Metropolitan 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 2016

### How to reserve your place

- **On line:** You can book online at: <http://www.awics.co.uk/schs2016.asp>
- **On line:** You can down load this form from, <http://www.awics.co.uk/schs2016.asp> 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 London session is £250 plus VAT making a total of £300. The cost of the Leeds session is £195 plus VAT making a total of £234. The fee includes lunch\* and book – 'All you Want to Know about Service Charges in Social Housing'.

\* Please let us know if you have any special dietary requirements.

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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