

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

September 2016

We are holding our seminar on 'All You Want to Know about Service Charges in Social Housing in Wales' in Cardiff on 6th September 2016. 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 are now introducing 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 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"**

Venue and Date: Novotel Hotel, Cardiff – 6th September 2016

This seminar is also available in-house. For further information about in-house sessions, please contact Adrian Waite on 017683-52165 or adrian.waite@awics.co.uk



Offices of Valleys to Coast Housing in Bridgend

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; 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.

12.15 How to de-pool service charges?

De-pooling service charges in local authorities; 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; 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; preparing for the possible devolution of housing benefit budgets.

14.45 BREAK

15.30 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'. 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

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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
- **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. 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

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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