



Management Services for Residents of Retirement Housing

FOREWORD

This document summarises the work that Peverel Retirement & Peverel Retirement Scotland (Peverel) undertakes in the management of retirement properties on behalf of its clients in exchange for its management fee.

It should be noted that the precise extent of the services provided at each development is determined by the terms of the relevant lease and Peverel may be receiving its instructions from the landlord or the management company as the lease determines.

Peverel procedures:

- Satisfy the expectations of Residents as to the standard of service offered
- Form the basis of good and prudent property management
- Comply with the relevant Codes of Practice, legislation and recommendations of organisations involved in private retirement housing.

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The term 'House Manager' may also refer to:

Estates manager
Relief Manager
Lodge Manager
Concierge
Residential House Manager
Administrator

1.0 General Management

1.1 Procedures and Staff

Procedures are designed to form the basis of good and prudent property management and to comply with all the relevant codes of practice, legislation and the recommendations of organisations involved in the private retirement housing sector.

Suitable and experienced staff are employed and senior managers attend conferences and seminars on the introduction of new legislation, regulations and codes of practice.

Providing care and peace of mind is given a high priority and staff are committed to resolving Residents' concerns within pre-determined timescales.

1.2 Communication

Regular contact with Residents is maintained through meetings either in groups or with individuals.

Residents, their families and advisers can contact the office in writing, email or by telephone with queries or problems. These are dealt with by the appropriate level of management staff.

If residents do have any questions/queries they can write to:

Peveler Retirement
Halesowen Administration Centre
11-12 Centre Court
Vine Lane
Halesowen
West Midlands
B63 3EB

Tel: 0845 450 1809 or 0121 550 5680
Fax: 0121 550 0385

Email enquiries: enquiries@pevelerretirement.co.uk

As and when required, 'Forum' meetings may be arranged with groups of Residents from different developments in an area to discuss issues of common interest concerned with management of the developments.

Area Managers are in constant touch with developments in their area and make frequent visits.

The Life&Style magazine which incorporates news of current events, contributions from Residents and details of social activities, is produced half yearly and is sent to all Residents free of charge. Production costs are covered by advertising revenue and sponsorship.

1.3 Liaison with Landlords

Regular meetings are held with landlord companies at all levels of authority to establish policy and rectify any anticipated issues.

Continuous customer surveys regarding new concepts on cost saving, communications and improvements to services are carried out on a panel basis and recommendations are made to Landlords.

1.4 Industry Representation

Peverel subscribes to membership of the Association of Retirement Housing Managers (ARHM) and takes an active part in its activity which includes the setting of industry standards, the lobbying of government on matters of leasehold legislation and the approval by government of the ARHM Code of Practice.

1.5 Residents' Associations

The formation of a Residents' Association is actively encouraged and if Residents want to form an association, then guidance is available from the House Manager.

If you would like to know more about the constitution guidelines for setting up a Residents Association, then please contact Peverel Retirement.

1.6 Disputes

Peverel has publicised a comprehensive complaints procedure which Residents should follow in the event that they receive unsatisfactory service. This is available on the Retirement website under the 'Contact Us' section.

Peverel is a member of the Housing Ombudsman Service which will provide Residents with a forum for complaints where an independent third party will, where necessary, investigate and then come to conclusions, with potential sanctions to exercise.

As appropriate on other disputes, Peverel will liaise with AIMS (Advice, Information and Mediation Services).

Peverel will liaise with guarantee bodies such as the National House Building Council (NHBC) or Zurich on behalf of Residents in the event that an insurance claim arises in respect of communal areas or structural matters.

2.0 Care of Residents

2.1 Personal Emergencies

In the event of an emergency a Peverel representative is available during working hours to provide advice and will summon assistance if required. They are also backed up by CarelineUK who are available 24 hours a day, 7 days a week.

2.2 Security

Checks are carried out by House Managers during working hours and immediately before going off duty.

2.3 Availability of Advice

House Managers are available to put Residents in touch with organisations who can provide advice on a wide range of financial and welfare matters.

Advice is given on suitable alternative accommodation should a Resident's health deteriorate to the extent that retirement housing is no longer appropriate.

Where possible, links have been established with all the statutory authorities including social services, meals on wheels, nursing services, home help, day centres and a range of services.

2.4 Suitability of Residents

If requested, Peverel assists families in making decisions on the suitability of retirement housing for prospective Residents with mobility and/or general health problems.

Whenever possible, assessments of incoming Residents and discussions with families are carried out. Such assessments are carried out discreetly by experienced staff.

2.5 Social Events

Peverel encourages Residents to organise social events for themselves and will, if desired, assist with organisational requirements. Events range from coffee mornings and theatre trips to excursions. Fund raising activities for the development or for charities are also supported.

2.6 Representation

Peverel makes representations to government and lobbies on issues of relevance to its Residents.

3.0 House Managers

3.1 General

In some cases, the larger developments may have a Relief Manager to assist the House Manager.

In smaller developments a visiting Day Manager is employed.

Peverel has a bank of relief staff who are available to provide cover for permanent staff through holiday, attendance at training course, illness or compassionate leave.

Salaries and hourly pay rates are reviewed annually.

House Managers are supported and supervised by Area Manager to ensure that their duties are carried out to a satisfactory standard.

The cost of staffing a development is charged to the service charge account.

3.2 Recruitment

Advertisements are placed in the most appropriate and cost effective publications to attract suitable applicants. Advertising costs for house staff are collected from the service charges.

Suitable candidates are invited to an interview, normally on the recruiting development, to illustrate the working environment.

As becomes necessary, a second interview is carried out to assess the applicant's lifestyle and suitability.

Reference and basic CRB checks are always undertaken.

3.3 Training

The following 'on the job' training facilities are provided:

- A four day induction programme with an experienced training House Manager to cover all aspects of the role to be carried out.
- Attendance at conferences and seminars on specialist services to ensure that skills and knowledge is updated in line with best practice.
- Peverel has created its own NVQ in House Management which has been specifically designed to apply to the role of a Manager within Peverel Retirement.
- This is a recognised qualification, accredited by Edexcel as a level 3 NVQ. All Managers are encouraged to take part as it enables them to refresh and check their knowledge and skills and is also a way to demonstrate working within company standards and procedures. It is also occasionally undertaken by a Manager who is finding the role challenging to help them improve their performance.

Attendance on a recognised First Aid Course to obtain a Certificate in First Aid and to undertake training in food handling for which a charge will be made to the service charge account.

Each House Manager is provided with a manual of operation procedures and Health and Safety procedures which is regularly updated.

3.4 Duties

- To take immediate action in the event of an absolute emergency summoning assistance from the appropriate authority when necessary during duty hours and outside of duty hours. CarelineUK may also perform this function.
- To maintain records of Residents in order to provide appropriate data to emergency services.
- To supervise use of communal facilities to ensure that Health and Safety standards are maintained.
- To keep petty cash accounts; collect and bank guestroom charges, lounge hire charges and service charge monies as appropriate.
- To authorise and record invoices submitted for services.
- To monitor the regular attendance of contractors carrying out the servicing of equipment on the development such as lifts, alarm systems, fire alarm systems and oversee the call out of contractors for emergency repairs as necessary.
- To supervise contractors and approve satisfaction of contractors attending to clean communal areas and maintain communal gardens.
- To maintain a high profile on the development at all times during working hours.
- To establish friendly communications with residents, offering advice on problems when required, ensuring next of kin are informed of any problems where appropriate.
- To maintain a daily log in your office diary of major and important events within the development
- To carry out a daily check using the “residents’ daily check list” of all Residents and recording the results of that check. Half an hour before the end of the working day, recheck the register.
- To visit or call by telephone “at risk” residents and recording this in “Residents’ Daily Check List” (Historically, on a small number of older developments daily calls are made via the emergency call system and these must be recorded in the Residents’ Daily checklist). By “at risk” we mean residents who are ill, have recently been ill or are recovering from hospital, recently bereaved, disabled or confused.

3.5 Payroll & Salaries

The Peverel Group Payroll Department processes the salaries for all staff within the Group and in accordance with Peverel's policies. This will include such items as Company sick pay, overtime, call out payments and expenses. We also process payment for Relief staff employed to provide cover for annual leave and other absences.

In addition to the basic salary for employees, we administer in strict accordance with HM Revenue & Customs legislation, the 'employer on-costs' which includes Employer's National Insurance Contributions and Employer's Pension Contributions (where applicable). These details are reported to the relevant accounts administrators on a monthly basis. Peverel takes full responsibility for the timely and accurate payment of Tax and National Insurance contributions to HMRC and for the accurate reporting of these details for each tax year. In addition, we also ensure that all pension contributions and other deductions, voluntary and statutory are paid over to the appropriate authority within the legal timescales.

4.0 Maintenance and Repairs

4.1 Staff

Experienced staff are provided who have specialist knowledge of equipment and buildings and who are able to identify major problems.

4.2 Maintenance

Contracts are negotiated and reviewed annually for the regular inspection and servicing of lifts, the various types of emergency call and alarm systems and door entry systems.

Contracts are arranged with firms to carry out gardening work, cleaning of communal areas and external window cleaning. Performance is checked and approved before payment is made.

Internal and external re-decoration of communal areas is arranged at agreed times or in accordance with the terms of the lease or as becomes necessary. Developments are inspected and contractors' quotations are obtained. Residents and Residents' Associations are informed in accordance with the appropriate legislation. Work is inspected during progress.

Regular risk assessments of buildings and communal areas are carried out and any necessary works are carried out.

4.3 Repairs

A 24 hour emergency call out facility is provided for all developments. Arrangements are made for repairs to communal equipment as occasion requires. Where appropriate, Peverel will appoint external consultants to advise on maintain and make repairs of a specialist nature. Costs would be met from the service charge.

4.4 Compliance with Regulations

All work is undertaken to satisfy the following:

- British Standard Codes of Practice
- IEE Regulations (Institution of Electrical Engineers)
- Health and Safety Executive including control of substances hazardous to Health (1988) Regulations (COSHH)
- Water Authorities
- Working at Heights regulations 2007
- Management of Health and safety at work Regulations 1999
- Health and safety at work Act 1974
- Approved code of practice and guidance – the control of Legionella bacteria in water systems 1999
- Reporting of injuries, diseases dangerous occurrences regulations 1995
- Control of substances hazardous to health regs 2002
- The regulatory reform (fire safety) order 2005
- Health & Safety (display screen equipment) regulations 2002
- Gas safety at work Act 1974

5.0 Money Matters

As required by the NHBC Code of Practice, purchasers are provided with a Purchasers' Information Pack which contains details of the landlord, the managing agent, services provided, accounting procedures and grievance procedures etc. A fee may be payable for the provision of this information.

Information is provided to the solicitor acting for the purchaser, such as three years' audited accounts, details of insurance cover and premiums, debtors' situation, budgets, unusual items of expenditure, re-decorations cycles, contingency funds, etc.

Transfer fees and registration fees are collected and accounted for to the Landlord on receipt.

Peveler offer a Retirement Homeseach service for people looking for new or pre-owned properties. Retirement Homeseach also advises customers on the resale of their current property and are able to offer in house sales agency services.

5.1 Service Charge Income

Peveler will draw up an initial service charge budget for the development when it is first occupied and it is then reviewed and adjusted annually as required.

Prior to each new financial year, draft budgets are reviewed and presented to the Residents of each development and a budget established for that year.

The final budget for the service charge forms the basis of the income to the development for its expenditure during that financial year.

The service charges and ground rents are collected in accordance with the terms of the lease based upon the budget. Payment is made by one of the following methods:

- Direct Transfer
- Credit/Direct Debit
- By cheque on receipt of invoice

Company procedures with regard to debtors are applied.

Ground rent is accounted to the landlord within 28 days of receipt.

5.2 Bank Accounts

A bank account is maintained for each development – to hold and protect client funds in trust for tenants - as required by the section 42 of the Landlord and Tenant Act 1987.

5.3 Service Charge Expenditure

Competitive quotations for works are obtained when required to do so by statute and according to circumstances.

Work is checked and approved before payment. Expenditure is regularly reviewed.

5.4 Preparation of Accounts

An account of income and expenditure is maintained for each development. At the end of each financial year, each account is submitted for audit and, after audit, copies are distributed to each Resident or adviser. Additional copies to Residents Associations are provided as required.

The invoice file containing the invoices for all payments made during the most recent year is sent to the development on request for view by Residents.

5.5 Audit Fee

Audit fees are negotiated each year.

5.6 Insurances

Insurance is generally placed by our insurance department via an independent national broker who will also remarket the portfolio every three years reviewing cover and costings, in conjunction with our insurance department.

Certificates of insurance and policy wordings are available from the insurance department upon request.

A dedicated claims team, contractors and loss adjusters are on hand to deal with all notified claims. The insurance department are available during office hours to answer any queries Residents may have.

5.7 Operational Costs

The management fee has to cover operational costs incurred by Peverel in providing management services. Costs are incurred under the following headings, but should be noted that the list is not exhaustive:

Staffing

Salaries

- Employer's NI Contributions
- Employer's Pension Contributions
- Relief Pay
- Sick Pay

Recruitment/Relocation

Subscriptions

Training

Staff Welfare facilities

Travel and Accommodation

Fuel

Motor vehicle costs

Expenses

Office Overheads

Repairs and Renewals
Rates
Rent
Heating and Lighting
Insurance
Depreciation
Cleaning
Building Maintenance and Repair

Office Running Costs

Printing and Stationery
Photocopier Costs
Postage
Telephone
Equipment Leasing
Information Technology Systems
Sundries

Legal and Professional

Legal Services
Bad Debt provision
Bank Charges
Audit Fees
Payroll Handling