Feature: Listed and Historic Buildings

FlatLiving Magazine

Information, advice & guidance
for RMCs and Property Managers

June 2024

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Welcome

Welcome to our June issue of Flat Living Magazine!

This month our contributors have focussed their features on **listed and historic buildings**. They have covered everything from passenger lifts throughout the ages and making historic buildings fit for modern living to navigating claims processes.

Be sure to visit page 7 where we celebrate 10 years of **Future Group** and page 8 for more on this years **ACE Awards Charity Partner.**

In news - You can find **The Property Institute** Service Charge Index and Report alongside the latest comments on the **Leasehold and Freehold Reform Bill**.

As always, we have included training opportunities from **TPI** and job vacancies from Block Recruit to help you upskill or move on to new pastures.

If you have any questions you would like us to organise an article on, or if you have any interesting articles to add – please send them directly to the team via info@flat-living.co.uk.

Happy reading!

Belinda Bagnall and The Flat Living Team

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News

Leasehold and Freehold Reform Bill Becomes Law

On Friday 24th May an important piece of legislation, namely the Leasehold and Freehold Reform Bill, received Royal Assent.

The Leasehold and Freehold Reform Act 2024: FAQs

The 2024 Act made it onto the statute books on 24th May 2024, just two days after the election announcement and as the final session of this parliament was brought to a close.

Here, Mark Chick of Bishop & Sewell sets out some answers to a few frequently asked questions.

Click here to read more.

A spokesperson for The Residential Freehold Association, said:

"The Leasehold and Freehold Reform Bill is a defective and poorly evidenced piece of legislation which has ignored the outcomes of consultation with industry and leaseholders alike.

"The Government has pushed this Bill through without proper scrutiny and as a result there is work to be done to ensure there are no unintended consequences that will negatively impact leaseholders."

Andrew Bulmer, Chief Executive of The Property Institute, gives his comments below:

"While we supported much of this Act and very much support the principle of greater transparency for leaseholders, the Act was always going to be a missed opportunity, with government steadfastly resisting amendments that had cross-party and industry support. This Act could have gone further, removing blocks that prevent leaseholders from accessing energy-efficiency measures to improve their homes in preparation for Net-Zero, and introducing mandatory qualifications and regulation for those that manage the life safety of residents and greatest assets of leaseholders, both of which were tabled as amendments on behalf of TPI during the Lords stages.

Whilst these amendments were not moved into the Act, we expect that these vital reforms will become a priority for the next administration if the current General Election polls prove correct. Encouragingly, the standard chart of accounts for service charges, something TPI campaigned for during the Building Safety Bill's passage, has been included in the Act, which will help improve transparency for leaseholders.

"We will be updating the profession on what the new measures mean and the practical steps that they will need to think about to ensure they stay compliant and deliver on the limited promise of this Act as it comes into force and will continue our engagement and collaboration with civil servants to influence the details of the secondary legislation that will follow over the coming months."

Comments from Scott Goldstein, Partner at Payne Hicks Beach on an Unclear Leasehold and Freehold Reform Act 2024

The Act introduces a number of welcome changes. A number of those changes will make it simpler for leaseholders to acquire the freehold, or the right to manage, or extend their leases. Historical distinctions between the treatment of leasehold houses and flats have been abolished, so that all leaseholders benefit from the same rights, which include the right to extend their lease by 990 years, as against 90 years currently for a flat, and only 50 years for a house.

The Act continues progress towards fairer charges to leaseholders, for example by giving them greater transparency over their service charges and expanding the scope of redress schemes.

Click here to read more.

Leasehold and Freehold Reform Bill becomes law – commentary by Mark Chick - director of ALEP (Association of Leasehold Enfranchisement Practitioners)

"In what are some of the biggest changes to the residential leasehold sector in the last 21 years since the Commonhold and Leasehold Reform Act 2002 came into force in 2003, we now have a major shift in the direction of the law as it relates to residential long leasehold enfranchisement (the right to buy your freehold or extend your lease), with the passing of the Leasehold and Freehold Reform Act 2024."

Click here to read more.

Bob Smytherman, Chair of the Federation of Private Residents' Associations (FPRA)

"On behalf of The Federation of Private Residents Association Ltd I am delighted that after many years of lobbying successive Governments for a fairer legislative framework for leasehold flat owners, I am delighted to have worked cross-party with my local MP Sir Peter Bottomley as Father of the House of Commons & members of the All-Party group to get Royal Assent before General Election".

A Changing Landscape for Leasehold - The road ahead following the Leasehold and Freehold Reform Act 2024

Leigh Shapiro (Partner) and Rachel Hardington (Associate) write an in depth piece:

"A week on from the Act receiving Royal Assent, we look at what we know, and what we don't know, about the changing landscape for leasehold, and the road which still lies ahead."

Click here to read more.

Following the enactment of the Leasehold and Freehold Reform Bill, Robert Poole, Director of Glide (part of Leaders Romans Group) said:

"For years, the leasehold system has been a topic of contention, leaving homeowners and managers of blocks of flats grappling with uncertainties. The Leasehold and Freehold Reform Act aims to introduce measures to increase leaseholders' rights, provide them with more control over their properties, and make lease extensions more affordable. It heralds a landmark shift in the leasehold system and a future in which homeowners are granted greater autonomy over their homes, with reduced costs and red tape.

"So it is good news that the Leasehold and Freehold Reform Act has passed into legislation imminently despite many other Bills falling victim of the general election's timing.

"As leasehold reform moves forward, the changes will undoubtedly create some challenges. A thoughtful and comprehensive approach that consults widely with practitioners, leaseholders and freeholders and considers all potential challenges is necessary to make the transition as smooth as possible."

New Chair of The Property Institute

The Property Institute (TPI) is pleased to announce the appointment of Baroness Hayter as its new Chair.

Baroness Hayter replaces TPI's incumbent Chair, Felix Keen, who is stepping down as interim Chair, a role he has held for the last year.

Appointed to the House of Lords in 2010, Baroness Hayter has held senior roles as Shadow Deputy Leader of the Lords, and Shadow Minister for Brexit and for Consumers. She has considerable chairing experience – having served as both Chair of the Labour Party and its National Executive Committee, of the Lords International Agreements Committee and of the Legal Services Consumer Panel. Baroness Hayter has held senior positions in consumer affairs, including chairing the Property Standards Board, the Property Agents Code of Conduct Working Group and the government's advisory group on Client Money Protection.

Commenting on her appointment, Baroness Hayter said: *"Getting residential property management right is key both for residents and landlords, but also for the professionals entrusted with managing this complex but vital service. The Property Institute is in a strong position, supporting agents and thus consumers alike. All such agents should be professional, trained and qualified to a high standard. This is the objective I share with the TPI."*

Outgoing Chair, Felix Keen said: *"It has been an honour to be a part of The Property Institute, at a time when the management of people's homes is undergoing seismic change and reform. I am passionate about improving standards and customer experience and am proud of our work to drive forward greater professionalism and transparency. Baroness Hayter joins TPI at a pivotal moment and brings a wealth of experience both in the property sector and in championing the interests of consumers, the perfect fit for the future direction of our industry. I look forward with excitement to working with Baroness Hayter and the TPI Board Members, to ensure we continue to serve and support our members and steer our profession to meet the challenges ahead."*

TPI Chief Executive, Andrew Bulmer said: *"I am delighted to welcome Baroness Hayter as Chair of the Board at TPI. Her chairing experience and her knowledge of legal and consumer affairs will both be great assets in our work to ensure that millions of leaseholders and residents are protected by competent, ethical and professional property management practitioners. "This is exactly the right appointment at exactly the right time as The Property Institute supports our industry to grow and change for the better. I would also like to warmly thank Felix for his valuable contributions during his tenure as interim TPI Chair and I am delighted he will remain on the Board."*

The Property Institute (TPI) Service Charge Index 2024

The Property Institute (TPI) has been concerned about rising service charge bills for some time, and in response to concerns and questions from leaseholders and other stakeholders, they have collaborated with their members to release service charge cost data and investigate the drivers behind rising service charge bills.

They are pleased to introduce the TPI Service Charge Index and Report, which will be repeated annually, to provide averaged data on service charge expenditure across the estates TPI members manage, as well as a detailed analysis into the trends, and the factors causing rising bills.

To read more on this and service charges, **click here.** You can also find the graphic in higher quality if you click on the link or image.



The Service Charge Index will be updated annually with new data. If you have any enquiries or questions about the Index and Report, please contact Jaclyn Thorburn jthorburn@tpi.org.uk

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Join us as we embark on a journey to redefine the art of flat living. Stay tuned for the launch of Flat Living Lifestyle – where inspiration meets innovation, and apartment living reaches new heights.



Future Group Gratefully Looks Back on 10 Years, Excited for the Future Ahead

www.future-group.uk

As Future Group celebrates its 10-year anniversary, we extend our deepest gratitude to all those who have been part of our journey. From our dedicated team members to our valued clients, supporters, and suppliers, we are immensely thankful for your contributions to our success.

Reflecting on the past decade, we are proud of the milestones we have achieved and the growth we have experienced. From our humble beginnings as a lighting and electrical division to our current standing as a leading SME with a diverse portfolio of services, each step of our journey has been guided by our commitment to innovation, excellence, and customer satisfaction.

2014 - 2024 10 CELEBRATING **TEN YEARS** IN BUSINESS

As we mark this significant milestone, we are filled with excitement and anticipation for the years ahead. The construction of our new state-of-the-art headquarters signifies our readiness to embrace the 'Future' and continue our trajectory of growth and expansion. We are confident that with the support of our exceptional team, loyal clients, and valued partners, we will continue to push the boundaries of excellence and make a positive impact in the industries we serve.

Moreover, we are thrilled to share that we have been honoured with multiple industry awards, expanded our operations by opening five new divisions, and surpassed expectations by growing our team from Jamie and Jordan to over 40 employees. Additionally, we are proud to contribute to environmental sustainability by taking steps towards a net-zero future, such as purchasing electric vans and company cars. Furthermore, we have embarked on charitable endeavours, conquering numerous heights including the three peaks and Kilimanjaro, all while investing in comprehensive training programs for our entire team.

Looking ahead, we are committed to building on our achievements, fostering strong relationships, and delivering innovative solutions that meet the evolving needs of our clients and communities.

Jamie Willsdon, Director of Future Group extends his gratitude to the incredible team members, loyal customers, and invaluable partners and suppliers who have contributed to the company's success. With a shared vision, and a commitment to excellence, Future Group eagerly anticipates the journey ahead.

Once again, we extend our heartfelt thanks to all those who have been part of our journey. Your trust, support, and partnership have been instrumental in our success, and we are grateful for the opportunity to work alongside you.

Here's to the next decade of growth and success!







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Future Fuel stands out as a multi-manufacturer-approved EV specialist and a leading authority in the leasehold block management space. With extensive experience in the leasehold block management sector since 2014, and a strong presence in the EV charge points and billing industry since 2019, Future Fuel is uniquely positioned to address the challenges arising from inherited EV chargers.

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Please see our Arma Partners dedicated service offering: https://future-group.uk/services/ev-charging/future-connect

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Hollie Gazzard Trust Announced as Official Charity Partner for the ACE Awards 2024

Fraser Allen
— Estate Management —

www.fraserallenem.co.uk

The Hollie Gazzard Trust, a leading charity dedicated to raising awareness about domestic abuse, stalking, and knife crime, is thrilled to announce its partnership as the official charity partner for the prestigious ACE Awards 2024. This partnership will bring greater visibility to the Trust's vital work and help generate support for its critical initiatives.



The ACE Awards, known for recognising excellence and exceptional achievements by UK managing agents, their suppliers and the work of their people in improving the lives of millions of leaseholders, has selected the Hollie Gazzard Trust for its noble mission and impactful work in the community. The Trust was established in memory of Hollie Gazzard, a talented hairdresser who tragically lost her life to domestic abuse in 2014. Since its inception, the Trust has been committed to providing education, promoting safety, and supporting individuals affected by domestic abuse and stalking.

"We are honoured to be chosen as the charity partner for the ACE Awards 2024," said Nick Gazzard, CEO Founder of the Hollie Gazzard Trust. "This partnership allows us to reach a broader audience and further our mission of making a positive difference in the lives of those affected by domestic abuse and stalking. We are grateful to the ACE Awards for their support and recognition of our work."

The ACE Awards will take place on 21st June 2024 at Old Billingsgate, London, where industry leaders and professionals will gather to celebrate outstanding achievements.

During the event, Jodie Fraser, Chair of Trustees for the Trust, and CEO of Fraser Allen Estate Management will address attendees to give everyone the opportunity to learn more about the Hollie Gazzard Trust, protecting property managers and how attendees can contribute to its cause through various fundraising activities, which will be followed by a video produced in conjunction with Insurety about a new initiative for keeping property mangers safe.

Funds raised during the ACE Awards will support the Trust's innovative programs, including Hollie Guard, a personal safety app that provides real-time protection and assistance, and educational workshops aimed at preventing domestic abuse and promoting healthy relationships.

For more information about the Hollie Gazzard Trust and the ACE Awards, please visit [Home – Hollie Gazzard Trust] and [ACE Awards 2024 – Events – The Property Institute (tpi.org.uk)].

For more from Fraser Allen, click here.

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Developing & Monitoring Your Asbestos Management Plan

www.4siteconsulting.co.uk

Since the Control of Asbestos Regulations 2012 came into force, Duty Holders of multi-occupancy buildings have been responsible for reducing the risks of exposure. This responsibility usually falls to the Property Manager or Landlord of the building.

Here we'll be explaining the fire door responsibilities outlined in the regulations, and exploring whether a specialist inspection is required to ensure compliance.

What is an Asbestos Management Plan?

An asbestos management plan is an off-shoot of your annual maintenance plan for the building. It lays out the necessary steps you need to take throughout the year to ensure compliance with current regulations.

A solid management plan ensures proper management of any Asbestos-Containing Materials (ACMs) within the building. This ensures the safety of your residents and any staff or visitors that spend time in the block.

What Should the Plan Include?

Your plan should include comprehensive documentation and written details, all organised for effective ACM management. We would recommend keeping everything online, but physical records are also compliant. Preferably using cloud-based software for ease of accessibility by all staff and future managers of the building.

When you're putting your plan together, keep in mind that it should be site-specific and you should state who is responsible for each element throughout. It doesn't need to be overly complex. In fact, the ideal plan is very easy to read and accessible to all.



Your plan should include:

- The names of those responsible for managing asbestos within the building including any deputies
- The asbestos register for the building, including your site plan (which clearly indicates where the ACM is already located as well as areas yet to be inspected)
- A detailed schedule for monitoring the condition of known ACMs
- A plan for how you will share your asbestos register with any staff (temporary or otherwise) who will be working on site
- Explain the control arrangements you have in place to ensure the ACMs aren't disturbed.
- Describe the emergency procedures you will follow if the ACMs are disturbed in any way.

Prioritising Your Actions

In terms of prioritising your plan, you will need to set clear, time-based actions that are continuously reviewed as plans evolve.

Any damaged ACMs or areas that are likely to be disturbed (either by day-to-day use of the site or due to upcoming works) should obviously come first. These will be highlighted in your risk assessment report.

If you are aware of damaged ACMs, these must be seen to immediately.



Your options for this are to:

For the sake of peace of mind for you and your residents, as well as saving you time, we would recommend asking a specialist to carry out your quarterly and annual checks. A specialist will know exactly what to look for, and their input will speed up any remedial works deemed necessary.

A specialist should certainly be instructed if any issues are found during your own checks- the Government notes suggest that

"if any issues are identified from these checks, it might be appropriate to undertake more detailed checks of doors (or the self-closing device)...This could include engaging a specialist."

If you, as the responsible person, feel that an expert eye is needed to ensure your compliance and to uphold resident safety, then asking your fire risk inspector to complete the basic quarterly and annual checks alongside the usual assessments may be best. This can also help to ensure a trail of paperwork that will ensure you can evidence your compliance with the regulations.

As fire safety specialists, we're more than happy to support you with general fire risk assessments as well as the annual and quarterly fire door inspections you need to undertake. Feel free to get in touch with our friendly team if you have any questions or would like further information

Your options for this are to:

Repair

- Protect
- Seal
- Remove

The best option for you will depend on the extent of the damage. Your risk assessor will be able to advise on this.

ACMs that are in good condition and that aren't likely to be disturbed are best left in place. They should be inspected on a regular basis to ensure they stay in good condition and are undisturbed. Any upcoming works that may impact the ACMs identified in your survey will need to be carefully considered.

Your options for this are to:

- Repair
- Protect
- Seal
- Remove

The best option for you will depend on the extent of the damage. Your risk assessor will be able to advise on this.

ACMs that are in good condition and that aren't likely to be disturbed are best left in place. They should be inspected on a regular basis to ensure they stay in good condition and are undisturbed. Any upcoming works that may impact the ACMs identified in your survey will need to be carefully considered.

A magnificent title

Continually review your plan as you progress, but take special care when:

- Works take place that affect ACMs
- Staff members or their responsibilities change
- ACMs have been accidentally disturbed or have depreciated on inspection
- You have carried out your planned condition checks.

Your asbestos management plan really should be a 'living' document that evolves throughout the year. It shouldn't be seen as a plan set in stone from the outset. Instead, it should be a go-to guide for staff. This ensures they consider any ACMs in the building during construction or maintenance. Additionally, conduct regular inspections on stable materials.

If you would like further advice and guidance on managing the asbestos in your building, please get in touch. We'd be more than happy to discuss your needs.

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The Development of AI Products

Written by Colin Stokes

MD of Adiuvo

adiuvo

www.adiuvo.org.uk

Colin Stokes, Managing Director at adiuvo talks about development of AI products.



Everyone is talking about AI, multiple companies are selling AI products but a significant number of agents we speak to are considering building their own. Having developed our own both for internal use and sale we thought we would share our experience.

I don't think its controversial to say that building an AI tool is relatively straight forward if those doing so understand the issues clients and the sector have and the resulting product solves one of those issue or improves one or many multiple processes.

For agents considering their own, of course they understand (better than anyone) what they are trying to achieve so no case of the Proptech "solution" failing at that hurdle, its then just (he says) a case of hiring or sourcing the right talent and then that talent having access to the right data.

The data is the key here and it's the most difficult part of the process. Your Large Language Model or LLM needs to learn from the largest possible data set so the question you need to address is do you have access to that data? If agents are doing this in-house then that battle is half won because sitting in your CRM, or your staff's knowledge bank is the information you need, you just need to extract it. In our case, developing a maintenance assistant, we had over 900,000 historic tickets and 15 years' worth of scripts. This allowed us to have closed learning (my preference) and control over the data the AI could learn from and meant not having to risk open learning in the big bad world where apparently things on the internet can sometimes turn out to be not true.

So, you have a product which has learned to an initial suitable level from trustworthy data, you even have the correct guard-rails in place so it cannot be manipulated like a DPD bot and in testing it hallucinates at less than 2% you have a winner right? Well in our experience the process we have discussed here is, as we said, the easier part.

What's the difficulty then? It is simply put, adoption and not from a costs point of view which perhaps in the past has been the main objection as if you have built an AI product properly with true company fit, it should absolutely allow cost or resource savings an elevation of service (preferably both) therefore what objections have we encountered?

When we introduced products t generated an almost immediate split into three; one third were wary of it and although remain open minded wanted to see it in use elsewhere or with other parties first, one third dismissed it and said, amongst other reasons, they didn't foresee it being the norm or useful to them and the final third jumped straight in and volunteered straight away to test it.

Unsurprisingly(?) these differences of reactions were based on demographics; younger participants were overwhelmingly positive so pick your initial targets carefully as successful internal testing and in-house advocates are the key to success. Once you find those partners, again in our experience, the process becomes easier and takes on a life of its own and a virtuous circle of feedback and improvement begins.

For more articles by Adiuvo, please click here.

Formed in 2007 by ex-London Property Managers, adiuvo (from the Latin to help or assist) to initially offer a service that had, in their opinion, been severely lacking; a professional and knowledgeable office based emergency out of hours' response for Property Managers.

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London's Great Estates

Who owns leasehold London?

London is a singular city in many ways, not least because the bulk of its most expensive leasehold property is owned by just a handful of families. In this article we take a look at the history of four of London's biggest landowners.

The Evolving Role of the Estate

Each of these great London estates has survived for more than 200 years despite dramatic changes in society, the swings to right and left of government policy, two world wars and financial booms and busts as well as changes to the tax regime, landlord and tenant legislation and successive town and country planning acts.

This is a testament to the business dexterity of the families that own these estates and their ability to move with the times- as well as their undoubted desire to 'keep it in the family' and provide for future generations.

The Grosvenor Estate



Gerald Cavendish Grosvenor, the 6th Duke of Westminster, was London's wealthiest landlord. He passed away in 2016 and at that time, according to his obituary, his fortune was estimated at 8.3bn by Forbes magazine- making him the 68th richest person in the world the 3rd richest person in the UK. His son, Hugh, inherited the estate.

The family own around 300 acres of land including some of London's most exclusive addresses which make up part of the Grosvenor Estate. The estate is most famous for its landmark residential properties in Mayfair and Belgravia but it also owns a portfolio of businesses, rural estates and other assets. According to figures from 2016, the organisation employs more than 10,800 people.

The history of the Grosvenor Estate began in 1677 with the marriage of Mary Davies and Sir Thomas Grosvenor, who was part of a family that can trace its roots back to William the Conqueror.

Mary had inherited 500 acres of land north of the Thames to the west of the City of London but it remained largely untouched until the 1720s when the Grosvenors developed the northern part (now known as Mayfair) around Grosvenor Square.

In the 1820s, building on their success in Mayfair, the family began to develop the area known as Belgravia, building Eaton Square, Chester Square and other famous addresses.

Later in the 19th century, Pimlico was developed but Grosvenor's property holdings in this part of London were sold in 1953. Despite much of the family's present-day portfolio now being located in other parts of Britain and Ireland, it is the London estate that is most often associated with the Grosvenor family.

The best known of Grosvenor's properties in Mayfair are located in and around Mount Street, Grosvenor Street, North Audley Street, Duke Street, and Park Street. In Belgravia, Grosvenor owns freehold properties in Eaton Square, Motcomb Street, Elizabeth Street, Pimlico Road, and Ebury Street.

The Cadogan Estate



The Earl of Cadogan comes a close second to the Duke of Westminster in the London property stakes as the main landlord in the west London districts of Chelsea and Knightsbridge. The portfolio covers 93 acres in fact!

Cadogan Estates Ltd is particularly associated with the area around Cadogan Square, Sloane Street and the King's Road in Chelsea where the company owns the freehold on a mix of residential, retail and commercial property. It also owns property in London's exclusive Knightsbridge.

The company's origins date back to Sir Hans Sloane, the eighteenth-century scientist who purchased what was then known as the manor of Chelsea in 1712. On his death, the Chelsea estate was split between his two daughters, one of whom was married to a member of the Cadogan family.

On the death of Sloane's other daughter, her share of the estate was left to her son Hans Stanley who in turn passed it to his sisters when he died. On their death, their half of the estate reverted to the Cadogans in 1821.

The Cadogan estate includes some of London's most sought after retail locations and residential property in some of the capital's most exclusive squares. In 2000, the company acquired the Duke of York's Headquarters, a former barracks adjoining Sloane Square, which has been converted to retail, office and residential use, as well as providing a home for the Saatchi Gallery.

The Chelsea estate comprises approximately 3,000 flats, 200 houses, 300 shops, 500,000 square feet of office space and over a dozen gardens covering 15 acres.

The Howard de Walden Estate



As of 2020, the Howard de Walden Estate in Marylebone was reported to be worth £4.7 billion.

The estate manages and leases around 92 acres of property in Marylebone, covering the streets running east to west from Portland Place to Marylebone High Street and north to south from Marylebone Road to Wigmore Street.

The Estate's portfolio is largely made up of Georgian property, including Harley Street, with a mix of medical, residential, office, retail/restaurant and education space- particularly in and around Marylebone High Street.

Much of the property now owned by the Howard de Walden family, was designed in the eighteenth century by architect John Prince. He was commissioned by the Earl of Oxford to produce a masterplan for a housing development centred around Cavendish Square, with Oxford Street acting as the southern boundary. In 1719, he drew up the first plan for the Estate, but progress was slow.

When the Earl died in 1741, his daughter, Margaret, who was married to the second duke of Portland, inherited the estate. The Duke of Portland continued the building programme- overseeing construction of the elegant properties that visitors to London are familiar with in Portland Place, Wimpole Street and Harley Street.

By the 1790s, the whole area from Oxford Street to what is now the Marylebone Road had been developed. Leading architects, the Adam brothers, were commissioned to design Chandos House in Queen Anne Street as well as houses in Mansfield Street and Portland Place (which was described as "the most magnificent street in London" by John Nash who designed Buckingham Palace and the Brighton Pavilion).

The Portland Estate, as it was then known, remained in family ownership until1879 when Lucy Joan Bentinck, widow of the 6th Baron Howard de Walden, inherited the land and the Howard de Walden Estate came into being, with the first family estate company established at the end of the First World War.

By the mid-1990s the area had fallen into decline with a third of the shops sitting vacant. By undertaking a major project to re-inject life into the area including providing schools and making buildings available for community use, the Estate has successfully revitalised the High Street with a trendy and eclectic mix of shops. Residential property in the area now commands top end rents in what has become one of central London's most desirable locations.

The Portman Estate



To the west of Marylebone High Street are the 110 acres of London land owned by the Portman Estate. The Estate is held in trust for the benefit of the wider family, with over 130 beneficiaries.

With a history dating back to the 16th century, the Estate covers Oxford Street from Marble Arch to Orchard Street, from the Edgeware Road in the west to Baker Street in the east and north almost to Crawford Street. It includes Portman Square, Manchester Square and the residential properties located in Bryanston and Montagu Square as well as two rural estates in Buckinghamshire and Herefordshire.

In addition to its core landlord operation, The Portman Estate runs The Portman Foundation- a charitable trust which supports charities and other causes located in or that are of benefit to the Marylebone area.

Henry William Portman, followed by his son Edward Berkeley Portman, built Portman Square in 1764 and then Manchester Square in 1770, followed in around 1810 by Bryanston and Montagu Squares. But building work wasn't carried out by the Estate themselves.

Instead, design was commissioned for the streets and the land then leased to private developers and builders, much in the same way that major regeneration projects are achieved today.

Financial pressures during the last century have changed the nature of the Estate, with what had been mainly residential property converted to hotels and commercial premises. A key feature has been the redevelopment of many of the original grand Georgian houses as mansion blocks which were let on long leases.

These blocks of flats and hotels are mainly located behind the Oxford Street/Edgware Road boundary of the Estate and today the area remains one of the most vibrant in London; a cosmopolitan, multicultural mix of tourism, retail, commercial and residential property.

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New beginnings: The foundations making historic buildings fit for modern living

ENCORE
www.encoreestates.co.uk

Grand, old manor houses sit proud in the countryside.

Impressive, architectural landmarks from bygone eras stand tall, wedged in busy cityscapes. Even in modern day housing developments you can find listed buildings with their heritage woven into the local community.



Everywhere we turn, historic buildings have stories to tell. Many of them are becoming the perfect new homes, welcoming new residents and families. But it takes a certain mindfulness of the heritage, and an understanding of the unique challenges of older properties to really make these historic buildings suitable for modern day living.

Take a buzzing new development on the edge of the City of London, for example. Set amongst the new-build high-rise apartment blocks is a building with an impressive frontage, stretching more than 300 feet, and with origins in the early 1900's.

As part of the new development, this building has been redeveloped too; creating new, luxury apartments with facilities including concierge, fitness and spa areas, a cinema room and much more. The wider estate comprises commercial and residential properties. The 1900s building was once an important part of the city's textiles industry, but today holds architectural delights alongside the many newly-created apartments. As a result, the building has been deemed historically important enough for both interior and exteriors to be Grade II listed.

The fact that such a historically significant building can now be home to many more families is brilliant.

The old has been given a new lease of life.



But for the apartments to be a true success – and for the building to preserve its heritage – exact care needs to be taken. And that goes beyond the initial redevelopment of the building, and into its ongoing care and management.

At Encore, we're the managing agent of many different historic buildings that require a bespoke approach to their ongoing maintenance. What may work for a new build, may not, for example, be appropriate for a listed building – or additional measures may need to be taken.

In the example from the City of London just described, the developer has taken excellent care during building works – and that care and attention then needs to be recognised by us as the managing agent too.

The building boasts an impressive entrance hall and stairwell, with incredible bottle green tiling. It's a beautiful frontage to have as an entrance to your home – but it is also listed. And that means extra care needs to be taken. As the managing agent and whilst we're getting set up to manage the estate – a period we call 'mobilisation' – we then need to consider whether steps need to be taken to preserve these important elements of the building. For instance, is a moving in strategy required, to make sure residents moving large items into their apartments don't inadvertently cause damage to the tiling and stairwell?



But there's much more that needs to be considered too. The managing agent needs to carefully assess the listing for a historic building, to understand how different parts of the building are affected. A thorough asset register needs to be taken; although this is done for new builds too, it takes on another level of importance in older buildings where certain assets have historical value. This is vital as it means the team managing the property going forwards have a clear and easy to follow guide of what is what, and how each area or item should be treated.

Again, taking the example in the City of London, we had to be sure to add old window eye bolts to the asset register for the building – clearly stating that they are listed items. It's a small feature, but a historically important one, having been fitted many years ago to enable safer window cleaning.

That in turn has informed our property management strategy – even if only to a small degree – for the building going forwards. Although the eye bolts aren't used for window cleaning now, we'll make sure contractors are aware of their presence, so they don't get damaged.

We even need to take a critical eye to make sure all has been done to keep modern fittings in keeping with the setting. For example, fire safety is of the utmost importance but where possible we'll look at fire alarms and fire safety systems to make sure they look right or whether they could be more discreet.

This thorough approach, mindful of the building's history, is taken from the very first days managing an estate, through to the ongoing property management strategy that will create a positive ongoing legacy for the development.

Historic buildings will demand additional considerations, for example, when it comes to budgeting for major works, such as redecoration, adjustments required to meet new building safety standards or external works to cladding or roofing.

The service charge – a fee per property in a development, which collectively funds the maintenance of communal spaces, amenities and systems – will need to cover the cost of these major works, and take into consideration additional implications due to a building's age and possibly listed status.



For example, if a surveyor needs to be engaged, then specialist surveyors for listed buildings will be required and contractors would preferably have worked on buildings with similar challenges. As the managing agent manages the contractors, it's vital that we work with those who understand the complexities of the development and what's needed from them to be sympathetic towards the history of a building.

The heritage of every property is different, and its place in our history unique, so there's never a one-size-fits-all approach to its ongoing management.

At Encore, we look after a regeneration scheme on an old American Air Base, where a listed watchtower has been melded into the community and where careful landscaping is needed to make it work as part of the wider estate.

Another example is a 1980s high-rise building, now listed, in London, known for its ship-like architecture.



With the right management it's become the perfect place for modern city-living, in a great location and communal facilities including secure parking, a 24-hour concierge service, a gym, swimming pool and sauna. The communal gardens contain tennis courts and a barbecue area.

Or, take a building from another era altogether, the mid 1800s, which was once an asylum and is now a Grade II listed building home to over 200 residential units. We even work with housing developments and apartment blocks where the buildings aren't
listed, but the gardens have significant historical importance.

All of these estates require very different management and maintenance, to preserve the important heritage of the sites. And it's not just preserving the physical amenities and features of a development, but making sure the history is respected and, where appropriate, becomes a part of the modern-day community.

That's why, from the very beginning 'mobilising' a new development, through to the ongoing property management strategy, at Encore we never use a uniform approach.

We always take a bespoke approach so the unique history of each place is preserved – and modern living comes to complement it. We put the right resources into each estate from the very start, from asset registers to scrutinising the listing of buildings, so we set off on the right foot. And as Head of Mobilisation at Encore, that's something I'm really proud to be a part of every day. It's brilliant to see so many historic places creating a new legacy for communities, from the city to the countryside.

About the Author



Laura McGill MTPI MIWFM AssocRICS
Head of Mobilisation

Laura has been working in the property management industry for over 18 years. During this, her passion for bespoke property management and historical buildings has been developed through various positions in the industry and on many prestigious developments (both old and new). Laura transitioned to mobilisation in 2023, and is heading up Encore's mobilisation team to ensure all new estates (no matter how unique) are set-up and have all aspects considered for the Estate Manager.

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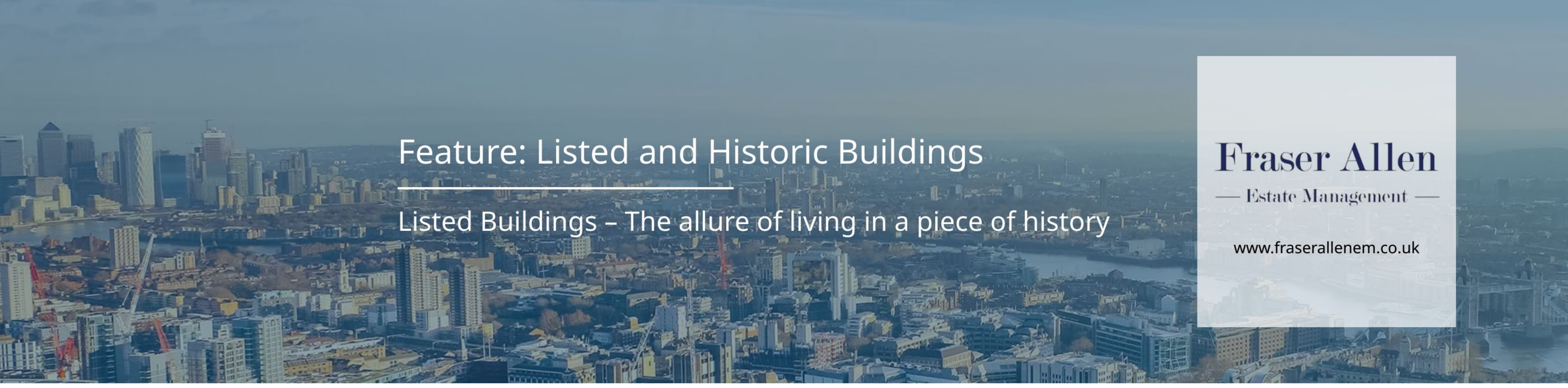

Feature: Listed and Historic Buildings

Listed Buildings – The allure of living in a piece of history

Fraser Allen
— Estate Management —

www.fraserallenem.co.uk

The allure of living in a piece of history is undeniable. Listed buildings, with their unique charm and architectural significance, offer a rare opportunity to reside within walls that tell tales of hundreds of years. However, the dream of owning such a property comes with its set of responsibilities and considerations, especially within the framework of managed leasehold properties. Understanding what it entails to buy and maintain a listed building is crucial for prospective buyers.



What is a Listed Building?

A listed building is officially recognised as being of special architectural or historic interest and is included on The National Heritage List. This designation aims to protect the building for future generations, ensuring that its unique character remains intact.

The listing not only encompasses the entire structure, including the interior, but may also extend to any attached structures, later extensions, and pre-1948 buildings on the surrounding land, referred to as 'curtilage'.

Each listed building is unique, making it essential to consult with your local planning authority to understand the specifics of what the listing covers for your property.

Which Buildings are Listed?

The primary criteria for a building to be listed is its age. Buildings constructed before 1700 that have maintained their original condition, or something close to it, are typically listed.

The majority of buildings erected between 1700 and 1850 are also listed. Post-1945 buildings undergo a more rigorous selection process, with listing considerations including technological advancements, notable features, or association with a particular architect.

Recent listings of note include the Royal Festival Hall and the BT Tower in London.

Five Key Considerations for Buyers

1. Listing Categories: Listed buildings are classified into three grades:

– Grade I: Buildings of exceptional interest, comprising 2.5% of all listings.

– Grade II*: Particularly important buildings of more than special interest, accounting for 5.5%.

– Grade II: Buildings of special architectural or historic interest, making up 92%.

2. Special Permissions: Altering a listed building requires consent from the relevant authorities, even for minor changes, to ensure the building's character is preserved.

3. Higher Repair Costs: Specialised tradespeople with skills in historical construction techniques may be necessary for repairs, leading to higher costs.

4. Potential for Grants: Historic England offers grants for repairs that might not be feasible without financial assistance.

5. Specialist Insurance Needed: Insurance for listed buildings should cover the cost of rebuilding using appropriate materials and techniques, which can be more expensive than standard methods.



Managed Leasehold Properties and Listed Buildings

For those living in managed leasehold properties, such as those managed by Fraser Allen Estate Management, the complexities of owning a listed building still apply.

Managing Agents will often advise residents on matters related to the listing status of their properties. Whether leasehold or freehold, the historical significance and preservation requirements of the property must be considered.

Checking a Property's Listed Status

If you're uncertain whether a property you're interested in is listed, The National Heritage List for England provides a comprehensive database.

This resource is invaluable for potential buyers looking to understand the historical and architectural significance of their prospective homes.

Conclusion

Owning a listed building is both a privilege and a responsibility. It offers a unique opportunity to live in a piece of history, contributing to the preservation of architectural and cultural heritage.

However, it also imposes certain obligations on the owner, from obtaining consent for modifications to addressing potentially higher maintenance costs.

For those passionate about heritage properties, the effort and expense can be well worth the reward of preserving a piece of history for future generations.

Prospective buyers should approach the purchase with a clear understanding of the responsibilities involved, ensuring their dream home's historical value is maintained for years to come.

For more from Fraser Allen, click here.

Fraser Allen Estate Management specialise in Residential Block Management and are committed to ensuring your needs are put first. We bring an innovative, organised and reputable approach to the industry with a friendly team who are on hand to assist you.

Fraser Allen Estate Management | info@fraserallenem.co.uk | 01242 399150

Fraser Allen
— Estate Management —

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Feature: Listed and Historic Buildings

Partnering with a management company tailored to your building's unique needs

www.firstport.co.uk



Victoria Peake, Operations Director for The FirstPort Group

For Resident Management Companies (RMCs) and Right to Manage (RTM) companies, it's crucial to find the right property manager who can work collaboratively with Resident Directors to meet a building's unique needs.

At FirstPort, we look after buildings of all shapes and sizes, from countryside mansion stock, including listed and historic buildings, to London's most desirable city living abodes.

Victoria Peake, Operations Director for The FirstPort Group, works closely with our RMC and RTM clients in London to deliver consistent and high-quality service for their residents.

Understanding Legislation

With ever-increasing legislation, especially around building safety, the role of an RMC/RTM Director has evolved over the years. Directors can find themselves as the principal accountable person, responsible for the safety of all residents. For developments that are complex by nature, this responsibility can feel all the more daunting.

I've seen a shift in the support RMC Directors are looking for as the landscape of legislation has evolved, particularly in city centres like London where there are a large number of resident-managed high-rise buildings. Many Directors have day jobs, and the scale of responsibility can feel overwhelming.

We make it our mission to guide residents through the ever-changing regulatory and financial landscape. Larger property management companies, such as FirstPort, have been preparing for this for years, building teams and expertise to provide support. We have specialist teams dedicated to fire legislation and building safety compliance, as well as the usual health and safety requirements that come with looking after people's homes.

Our expertise and knowledge in these areas provide relief and confidence among the RMCs/RTMs we work with, ensuring that critical issues won't slip through the net, and we can promptly tackle the challenges this complex environment presents.

Creating a Community for Residents

Ensuring the safety of residents and managing day-to-day maintenance are key factors in the successful running of a residential development. However, Resident Directors also want to ensure their developments have a thriving community that all residents can enjoy.

I recently initiated a partnership with community events business Event Disco to launch weekly street food events across several of our residential developments in London. It has been a huge success, with residents providing positive feedback about this unique experience that enhances their community as well as the wellbeing of residents. It's something our RMC and RTM clients want to see more of, adding a different dimension to the service we can provide their customers, and we enjoy working alongside them to deliver something exciting and different.

Service Charge Cost Effectiveness of Property Management Services



A major driver for any RMC/RTM is ensuring value for money and making cost-effective decisions. This is more important than ever as service charges face substantial increases to cover essential costs such as building insurance and safety requirements. Recent research from **The Property Institute's Service Charge Index** found that service charges have increased by 41% in the last five years, with the three main causes being inflation, rising insurance costs, and costs associated with new building safety requirements. In particular, building insurance has faced an average increase of 92%, according to the data.

These cost increases have put enormous strain on residents' monthly finances, bringing difficult decisions when managing a development's budget. We work closely with our RMC/RTM clients to carefully analyse costs and benefits when assessing the service charge. Due to our scale, we have access to an extensive network of national contractors, giving us buying power that ensures the best value, particularly for utility costs, which have soared in recent years.

Collaboration to Achieve Long-Term Goals

When Resident Directors appoint a property manager, the key goal is to create a partnership with residents.

Together, we must work with RMCs/RTMs to understand where to focus attention and where to add value, based on their building's unique requirements.

We know that working alongside a collaborative property management company ensures improved efficiency, effectiveness of operations, and a renewed sense of community. This winning combination not only addresses immediate challenges but also fosters long-term success and satisfaction for our RMC/RTMs and their residents.

FirstPort is the UK's leading residential property services provider. With more than 40 years' experience, we work with over 1,000 resident managed developments, helping RTM and RMC Directors meet their management and legal obligations, all while delivering a great service for residents too.

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To arrange a development assessment visit:
www.firstport.co.uk/resident-directors

BRITISH SAFETY COUNCIL
Five Star Occupational Health and Safety Audit 2023

FIRST PORT



Feature: Listed and Historic Buildings

Historic & Listed Buildings and the Law

www.bishopandsewell.co.uk

Known as the "Hound of Holborn" to the property community, Charlie Davidson is a Senior Associate in Bishop & Sewell LLP's highly regarded residential property team. He deals with a wide range of legal matters involving complex and/or high value property matters in London and the Home Counties.

A building is generally listed as a recognition of its architectural and cultural value.

Listed buildings in England come under the protection of the English planning system, so that they may be preserved for future generations. Around 500,000 buildings are estimated to be on the National Heritage List for England (NHLE), including many residential properties. (It should be noted that this article only discusses listed properties in England, as listed properties in Wales have their own separate legislation).

Buying a listed property can bring with it unique challenges and responsibilities that you must be aware of during the conveyancing process and beyond.

A listed building is defined by section 1(5) of the Planning (Listing Buildings and Conservation Areas) Act (1990) as "a building which is for the time being included in a list compiled by or approved by the Secretary of State". In this case, the power falls to the Department for Culture, Media and Sport. When you own a listed building, you are not just a registered proprietor; you are also a custodian of part of this country's heritage. While a privilege, this duty also comes with a certain amount of responsibility.

There are three grades of listing, based on a building's architectural or historic interest:

- Grade I: These are buildings of exceptional national importance. Approximately 2.5% of properties on the NHLE are Grade I listed;
- Grade II*: These are particularly important buildings of more than special interest and have some national significance. Approximately 5.5% are Grade II* listed; and
- Grade II: These are buildings of special interest, warranting every effort to preserve them, but tend to be of more local importance.

Once a building has been listed, it will normally require listed building consent before it can be demolished, altered or be extended. This is a separate issue from any planning permission you would normally encounter. Consent may be required in tandem to planning permission or on its own.

Listed building consent is required for either the total demolition of a listed building, or for any alterations or extensions that would affect the listed building's character, whether inside or outside the property.

It is important to note that not all works will require consent. Consent is only required for works, such as internal or external alterations, that affect the character of the building. This can be a matter of individual judgement and as such there is scope for differences of opinion between the local planning authority, which has the ultimate say, and the listed building's owner.

What happens if I do not obtain consent?

Under the Planning (Listing Buildings and Conservation Areas) Act (1990) if work is carried out that should have had consent, the local planning authority has several options.

Firstly, the planning authority could pursue Criminal Prosecution of the people who actually carried out the work in question and the people who allowed the work to be carried out. Prosecution does not require the reversal of any unauthorised works to a listed building. Its purpose is to punish the offender and act as a deterrent to others. The punishment can range from an unlimited fine or up to two years imprisonment (or both).

Secondly, they could serve a listed building enforcement notice.

If works are carried out to a listed building without listed consent, enforcement can require the owner to bring the building back to its former state. Unlike breach of planning permission or building regulations, there is no immunity period for listed building enforcement action.

Alternatively, the planning authority could apply to the court for an injunction, which is the only way the local authority can act against an anticipated breach of listed building control.

If you are buying a listed building, it's important that any works to the property have been authorised by the relevant people. While the criminal liability discussed above can only be imposed on the people who carried out the work, enforcement actions can be taken regardless. This could force you to reverse any unconsented works that the previous owners carried out, which can prove very costly.

Bishop & Sewell has considerable experience in conveyancing, and all members of our residential property team are thoroughly familiar with the process. If you are thinking of buying a listed property or you have any questions regarding your existing property, please call 020 7631 4141 and ask for a member of the Property team or email mail@bishopandsewell.co.uk

This article is intended as a general summary on the law – no reliance should be placed on it.

Advising on property law is at the heart of Bishop & Sewell. Founded on property work, the issues matter to us as much as they do to our clients. We take pride in simplifying complex property issues, providing services covering every aspect – from purchase and sale, development and financing, to rental and enfranchisement.

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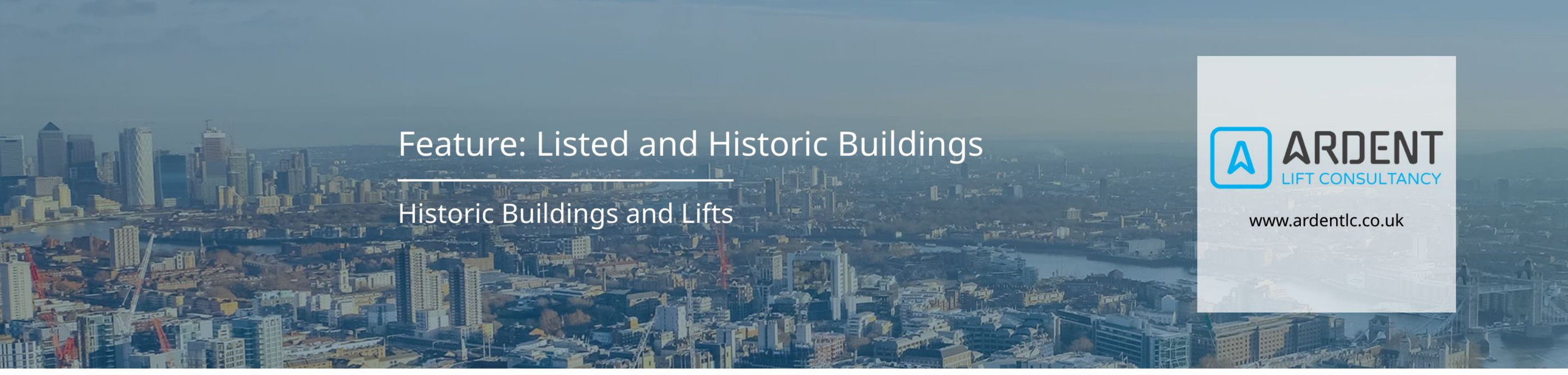


Feature: Listed and Historic Buildings

Historic Buildings and Lifts

www.ardentlc.co.uk

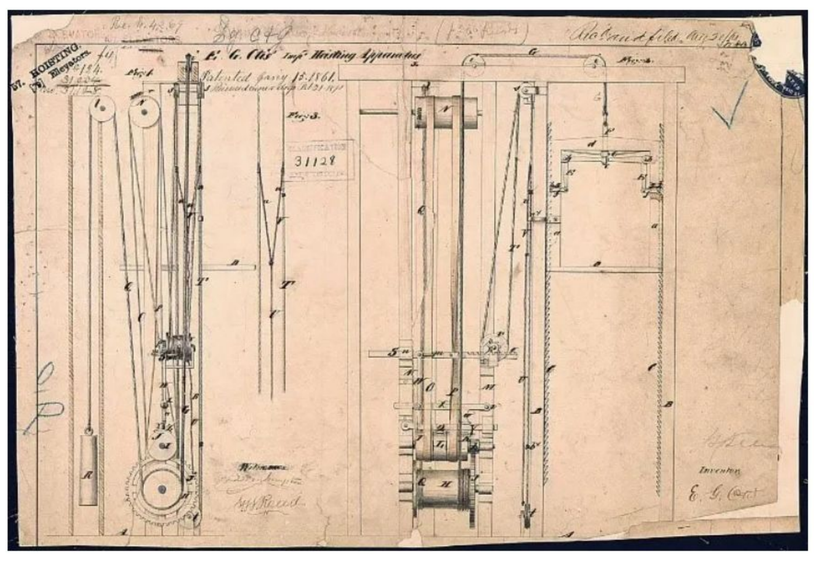
With this month's edition of Flat Living focussing on Listed and Historic Buildings, we felt it was a good opportunity to revisit classic designs of lift through the ages, as many of the designs can still be seen in our major cities today.

Early Years

Whilst there are numerous ideas of the first lifts used by man, with hemp rope devices being pulled by oxen an image frequently conjured up, the modern passenger lift has its roots in more recent history.

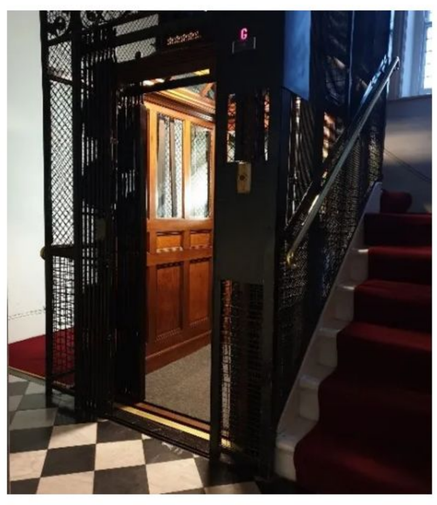
The screw drive system was utilised for the first time in a lift system in 1793 by Ivan Kulibin at the Winter Palace, St Petersburg. More remarkable is that the principal of the drive system is still used in modern disabled access platform lifts, some 230 years later.

Elisha Otis is credited with developing the modern lift (elevator) with his invention of the safety gear, an automated braking system, which he first demonstrated at a New York exposition in 1854. The first of these passenger elevators was installed in 1857 at 488 Broadway. The provision of a safety device to stop the lift car if the ropes failed revolutionised the lift industry and in turn, paved the way to high rise construction so familiar in today's skyline.



Modern lift equipment has improved upon the original design and fortunately with the safety factors of ropes/machines now far greater than before, it is a very rare occurrence to have the safety gear deployed in the event of emergency.

However, with the common ancestors of today's lifts dating back over 200 years, it is no surprise to find lifts of all shapes and sizes in some of the most recognisable buildings of the world.



Classic Design

When thinking of older lift designs, both London and Paris come to mind, with the stairwell lift, within a mesh shaft structure and with open picket (lattice) gates. There are some pristine examples of these still found within mansion blocks in our major cities (though a great number have lost the originality of the lift cars, with 1960 Formica overlay).

Our article in Flat Living E45 (also seen in our case study) focussed on a particularly well-preserved example of this classic design within a West London property, with a glazed lift car adding to the Art Deco design. We were (and remain) very proud to be able to sympathetically refurbish that lift, with a client who understood the importance of retaining the character of the building, whilst letting us improve the health and safety of the system for future operatives.

The HSE (understandably) want to see the removal of these lattice gates due to the serious risk they can pose. However, English Heritage (equally understandably) would like to preserve the character of these lifts wherever possible, as they are key to the design of these buildings, often forming part of a lightwell to common areas.

We are well versed at finding a balance between these two opposing viewpoints to maximise safety whilst retaining character, an art we want to retain in the Lift Industry!

Unconventional – but Effective

The Paternoster is a now outmoded lift system from the late nineteenth century, where a 'cyclic elevator' provided service to a building. The system is in essence a chain of lift cars linked together, which slowly travel the length of the lift shaft (from bottom to top) only to move horizontally at the top of the building to then descend in the neighbouring shaft. All the while, dozens of identical lift cars make the same journey, meaning a continuous arrival of lift cars at each floor, permitting the public to hop into the nearest cabin in their direction of travel, getting out at their required floor (think of London's Circle Line on a continuous loop).

Originally installed in Oriel Chambers in Liverpool (circa 1868), minor design alterations occurred before the Paternoster was adopted into public use and thereafter seen frequently installed throughout the first half of the 20th century. The design gained in popularity because despite the slow speed of each individual car (approximately 1 foot per second – enabling a step on/off to be achieved in travel), the collective number of cars per shaft enabled a faster flow of passengers in a public building (much like escalators).

The Arts Tower in Sheffield had a 22-storey version of the Paternoster installed (the highest in Europe), but simple calculations would indicate at an approximate height of 70m to the top floor of the building, it would take nearly 4 minutes in the lift car to travel from bottom to top floors!

However, the design suffered from a number of high-profile accidents and due to the constant movement of the cabins, they pose risk to anyone of limited mobility (children, elderly and disabled passengers being at most risk) when boarding/alighting the cabin. Subsequently, they are no longer permitted for installation and only very few now survive in operational service.

One notable exception to this was in the 2020 pandemic, where Northwick Park Hospital (London) reinstated their Paternoster for service after originally decommissioning the unit in 2013. The decision to reinstate the lift was undertaken to prevent crowding in the main lifts of the hospital, but the added benefit of no buttons to push and limited passengers per car would seem to play into further benefits obtained from the design. Paternoster lifts hospital's spirits | Latest news | LNWH

One final point on these units; the term Paternoster was applied to the lift as they operate in the form of a loop (with the design resembling rosary beads on a string). Paternoster means 'Our Father' the first two words of the Lord's Prayer in Latin – rather apt when considering the risks they have been deemed to pose.

Under Pressure

Within a number of UK cities, the installation of hydraulic power networks was established at the end of the nineteenth century. Hundreds of miles of high pressure cast iron hydraulic pipes pushed millions of gallons of water each week around the various networks.

It provided a cleaner source of power than the equivalent steam engines and in London alone it was utilised by approximately 8,000 lifts and cranes, using hydraulic pressures to drive pistons upwards, whilst releasing of the pressure would enable them to return to the lower floors.

Electric pumps began to replace the steam engines originally installed, but the system was finally decommissioned in 1977.

However, hydraulic lifts survive and operate using oil reservoirs (rather than mains water pressure), with self-contained pumps within lift motor rooms. The advent of the MRL (machine room less) lift has seen the decline in hydraulic lifts being installed, but there remains a time and place for their installation. Whilst slow in comparison to modern electric passenger lifts, hydraulic units are often found moving heavy loads over shorter distances, for example car park lifts are often hydraulic in design.

We are available to support you with any queries you may have relating to lifts of varying ages within your property.

You can contact the ARDENT team via their website or by emailing info@ardentlc.co.uk.

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As independent lift consultants, ARDENT Lift Consultancy recognise the importance of offering unbiased and accurate advice to our clients. This has developed mutual respect between our team of lift consultants and those we work with. Whether working with architects looking to build practicality into their vision, or a property manager with time constraints seeking immediate solutions, we totally understand individual client requirements and provide timely, well considered and accurate advice.

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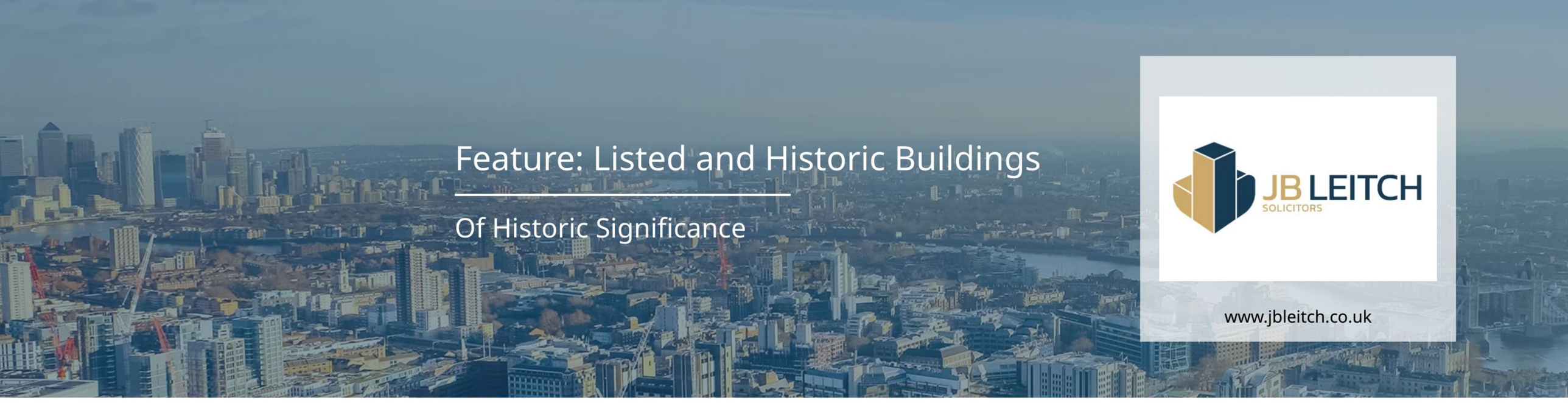

Feature: Listed and Historic Buildings

Of Historic Significance

www.jbleitch.co.uk

Owners, landlords, or managing agents have a legal duty of care towards maintaining the property in a reasonable state of repair and ensuring the safety and well-being of occupants or tenants. Failure to fulfil this duty may result in liability for negligence or breach of statutory obligations.

With regard to leasehold properties, the lease agreement typically imposes obligations on both the leaseholder and the landlord or management company. Leaseholders are often responsible for contributing to service charges, while the landlord or management company is responsible for the maintenance and repair of the structure and common areas. The Landlord and Tenant Act (LTA)1985 (and subsequent amendments) sets out legal rights and obligations for those who provide the services and the leaseholders that pay for such services. It addresses matters such as maintenance, repair, and importantly, the reasonableness of service charges.

Section 19(1) of the Landlord & Tenant Act (LTA 1985) imposes a general requirement of reasonableness in relation to service charge expenditure. Relevant costs are to be taken into account in determining the amount of a service charge payable for a period only to the extent that they are reasonably incurred, and where they are incurred on the provision of services or the carrying out of works, only if the services or works are of a reasonable standard.

The question of reasonableness must be considered by reference to the circumstances appertaining when the relevant costs were in fact incurred and not by reference to how the need for such costs arose. Accordingly, the fact that repair works are only necessary because of neglect or a breach of the landlord's repairing covenant does not prevent the cost of such works from being reasonably incurred. However, the breach may give rise to a claim for damages, and where such breach, consisting of a failure to repair in good time, results in further disrepair and a liability on the tenant to pay service charges, the service charges in question could form part of the damages and possibly give rise to an equitable set-off and therefore a defence to a claim for the recovery of such service charges.

An Historic Problem?



Defects in design, faulty installation or the use of inappropriate or inadequate materials when building a property can lead to significant problems later on.

Disputes over inherent defects in leasehold property frequently focus on the terms of the landlord's or tenant's covenant to repair. For liability to arise under that covenant, there must have been some disrepair or damage, which is a falling away or deterioration from the original condition of the item in question. Depending upon construction of the lease and interpretation of the clause, a covenant to repair may not carry with it an obligation to remedy poor design, faulty installation or any other defect that has not caused damage to the property. Where there is no disrepair, remedying such a defect would likely be an improvement rather than a repair.

If there is no disrepair, and if the covenants impose only an obligation to repair, then it is entirely possible for the court to find that neither party is responsible for remedying an inherent defect.

The position differs where the inherent defect does cause damage. There is no escape from liability merely because the need to repair stems from an inherent defect. If the covenant bites, and if it is not reasonably practicable to repair the damage without curing the defect, then the person who is liable to repair may also have to remedy the defect.

Claims, Damages & Set-Offs

A tenant is entitled to set off liquidated claims for damages, at law, and unliquidated claims, in equity, for damages for breach of covenant by the landlord against rent accruing under the lease. In leases this right of set-off and deduction is usually excluded by express words. A key question is whether or not a tenant is entitled to withhold rent or service charge in the event of a landlord's breach of lease.

There are circumstances when a tenant can set off rent where a tenant undertakes works which were the responsibility of the landlord; for example repair works. In that situation the tenant has the right to deduct that payment from future rents. Pre-1980 leases frequently do not specifically exclude the right of set-off because the commonly used tenant's covenant to pay the rents without deductions was considered adequate protection of the rent payments. However, it is now established that clear words are needed for set-off to apply—i.e., the words 'set-off' must be used within the lease to exclude the tenant's right.

An allegation of historical neglect does not touch on whether the service charge was reasonable under LTA 1985, s 19(1)(a). The question of what the cost of repair is does not depend on whether the repairs ought to have been allowed to accrue.

The key point to note is that the reasonableness of incurring the cost of remedial work cannot depend on how the need for a remedy arose.

However, where a tenant can show that eventual costs would be reduced or avoided, they will be able to use this 'historical neglect' argument as a defence against a claim for service charge and therefore have a claim in damages for breach of covenant. Depending upon the success of such arguments in any particular case, the damages could then be set off against the tenant's liability to contribute through the service charge.

Summary

In summary, successful claims for historic neglect can potentially present landlords and management companieswith a reduced amount of service charge payable by a lessee. However, such claims and set offs need to be supported by detailed and specific evidence and evaluated in context. There is clear distinction between reasonableness of cost at hand opposed to historic inactivity or further, accrued, deterioration over time. There is also the point of whether setting off the claim via the service charge is permitted under the lease or whether the leases contain explicit wording that denies this as a mechanism for potential reimbursement.

If you have any questions regarding this release, please contact Steve Sherlock, Head of Marketing on 0151 7082250 or email: s.sherlock@jbleitch.co.uk

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Feature: Listed and Historic Buildings

Preserving the Past: Listed and Heritage Buildings

www.earlkendrick.com

Listed and heritage buildings are not merely structures of historical significance; they are tangible links to our past, offering insights into architectural styles, cultural practices, and the evolution of societies. The preservation and maintenance of these buildings require a delicate balance between conserving their historic value and adapting them for contemporary use. Earl Kendrick Group play a crucial role in this process, bringing together expertise from various fields to ensure these buildings are preserved for future generations while remaining functional in the present.

Failure to adhere to regulations governing works on listed buildings or those within Conservation Areas can lead to severe consequences, including fines or imprisonment. Therefore, before embarking on any alterations to a historic building, it is imperative to enlist the expertise of a Chartered Surveyor to conduct a Historic Building Survey.

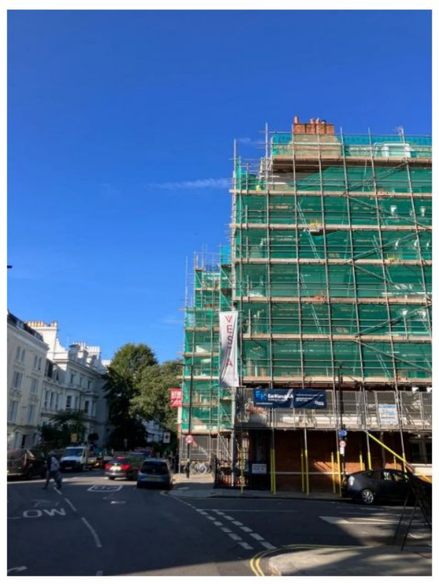
Understanding the historical context of a building is paramount to its preservation. Our surveyors undertake comprehensive historical research, delving into archives, maps, and records to unearth the building's narrative. This research forms the bedrock of our conservation strategy, ensuring that restoration endeavours maintain historical authenticity.

When executing works on heritage and listed buildings, it is crucial to address issues such as dampness, decay, and damage resulting from previous unsuitable repairs. It is imperative that interventions are reversible and do not compromise the building's structural integrity.

Listed Building Consent

Following a building's listing, listed building consent typically becomes a prerequisite for any demolition, alteration, or extension. This requirement stands distinct from the standard planning permissions typically encountered. Consent may be necessary in conjunction with planning permission or as an independent process.

It's crucial to understand that not all alterations necessitate consent. Consent is specifically mandated for works that impact the building's character, whether internally or externally. Given the subjective nature of this determination, differences of opinion may arise between the local planning authority, vested with ultimate decision-making authority, and the owner of the listed building.



Our Experience

Earl Kendrick Group boasts extensive experience in managing listed and heritage buildings. We serve as retained surveyors for numerous esteemed properties, including an impressive Grade II* Listed building that housed the Secret Intelligence Service (MI6) headquarters until the First World War's conclusion.

Another prime example of our competence is with a Grade II Listed residential mansion block located in Kensington. Over the years, EK has worked closely with the Management Board to implement several repair and maintenance schemes. This includes implementing the repair and maintenance of the external facades (split over two phases) and the refurbishment of the internal communal areas. As part of the refurbishment of the front façade, we liaised successfully with the local planning/listed building authorities to agree on the method of major structural repair to the balcony corbels.

A further case study demonstrating are experience in this area is as retained surveyors for a collection of stunning period buildings that were originally constructed as a Hospital in 1844 and subsequently redeveloped in the late 90's to create an exclusive, modern and highly secure gated development that retains many of its original architectural attributes. In addition to various surveying duties such as condition surveys and planned maintenance, we have overseen a number of major works project including external repairs and redecorations to both the listed building and new build blocks, communal internal redecorations and the refurbishment of the pool and leisure facilities.

Our overarching aim at EK when working on listed and heritage buildings is to not only preserve these structures but also breathe new life into them. Where possible we also suggest retrofit techniques in order to enhance energy efficiency and ultimately EPC ratings.

Contact Us

EK's dedicated team of Chartered Surveyors, Structural and Mechanical and Electrical Engineers bring years of specialised experience in surveying historic buildings. Whether your property holds listed status, sits within a conservation area, or you simply seek expert advice for its maintenance we are here to help.

We possess an intimate understanding of older buildings, from their construction techniques to the materials employed. We recognise the intricacies involved in their upkeep and the importance of engaging skilled contractors. With a thorough grasp of the rules and regulations governing their preservation and modification, our team is equipped to provide comprehensive guidance tailored to your property's unique needs.

For assistance on any heritage and listed building requirements, please don't hesitate to contact us on enquiries@earlkedrick.com

If you have any questions, contact Earl Kendrick:

Email us: enquiries@ekmcquade.com

Call us: +44 (0) 203 488 0516

Earl Kendrick Group are a multi-disciplinary firm of chartered engineers, surveyors and designers, providing national services from our offices in London, North, Midlands, West and South Coast.

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Feature: Listed and Historic Buildings

Claims Management: Navigating the Insurance Process for Listed Building Restoration

Residentsline Flats Insurance

www.residentsline.co.uk

Damage to listed buildings can be devastating for owners. These precious buildings are listed for their age, importance and beauty, so restoring them requires precision. Alongside meticulous attention to original architectural details and preservation standards, owners will also need to navigate a more convoluted insurance claim process.

This article provides guidance for owners including documentation requirements, the loss assessment process, and handling claim settlement negotiations.



Understanding Your Policy

Long before a claim arises, it's vital that owners understand their insurance policy. The terms and coverage of the policy can be confusing at the best of times, and listed buildings typically require specialised insurance that differs significantly from standard policies.

Read your policy carefully and highlight anything that isn't crystal clear before calling your broker or provider for clarification.

Specifically, you should make sure you understand:

- Any special conditions or exclusions: Ensure that you understand how any special conditions or exclusions could affect a claim.
- Your coverage limits: Check that your policy covers the full cost of restoration using appropriate materials and techniques required for listed buildings.

Immediate Steps After Damage

Prompt action can prevent further damage and simplify the claims process.

No matter what the cause or scale of the damage, your first step should always be to prevent further damage. Turn off the water supply, cover broken windows, apply temporary roof covers, etc. This is often a requirement of your policy to ensure that costs are kept under control to the best of your ability.

Once the threat to the building is under control, you need to document the damage. Take detailed photos and video footage as soon as it's safe to do so. Clear evidence of events and the damage caused will simplify your claims process immensely.

Preparing Documentation

Comprehensive documentation is crucial for supporting your claim and ensuring a fair assessment by the insurance company. It will also speed up the process significantly if produced promptly.

Your documentation bundle should include:

- Historical records: Gather any historical documentation of the building that detail its original features, designs and construction materials.
- Repair estimates: Obtain detailed estimates from experienced, specialist contractors, adept at restoring listed buildings. Quotes should outline the methods and materials required to meet historical standards of the building.

For you own records, you should also keep detailed accounts of all interactions with your insurer including emails, letters and summaries of phone calls.

The Loss Assessment Process

Your insurance company will assess the loss – a critical stage in the claims process. They will appoint a specialist Loss Adjuster with listed building experience.

Loss Adjusters are independent claims experts (whose actions are monitored by the Chartered Institute of Loss Adjusters). Their role is to ensure your claim is handled fairly and in accordance with the terms of your insurance policy. However, they are appointed and paid for by the insurer to act on their behalf. With this in mind, it is always a good idea to agree from the outset which firm will act as the loss adjuster in the event of a claim.

If you happen to disagree with the Loss Adjuster's findings, you can appoint an independent assessor for a second opinion. Just make sure they are experienced in working with listed buildings.

Working with Preservation Authorities

The restoration of listed buildings often requires approval from preservation authorities to ensure compliance with historical standards. You should discuss any planned restoration work with the relevant heritage bodies to ensure it will meet their standards – before beginning the work.

If they specify any further or unexpected guidelines, you must share these with your insurer and contractors immediately.



Claim Settlement Negotiations

Settling a claim for a listed building can be complex, given the need to adhere to preservation guidelines and the required use of specific restoration techniques. Negotiations can be convoluted, so make sure you're prepared to explain and justify to your insurer the need for specific restoration methods and materials, and the costs these incur.

Be ready to negotiate with the insurance company to cover all necessary costs. It can be beneficial to have an expert in listed buildings on your side during these discussions. If you've appointed an independent Loss Adjuster, their reports will be useful.

In cases where the settlement offered by the insurance company does not meet the restoration needs, it may be necessary to seek legal advice.

Conclusion

Navigating the insurance claims process for listed building restoration demands a detailed understanding of both the insurance policy and the specific preservation requirements of the building.

By carefully documenting the damage, preparing thorough documentation, and engaging effectively with both insurance adjustors and heritage authorities, property owners can manage claims effectively.

Head to the Residentsline website for information on all of our products and services or, if you'd like to speak to one of our fantastic, specialist team, give us a call on 0800 281 235.

Residentsline's sole focus has always been insurance for blocks of flats. Today, 25 years on, Residentsline is still the best choice for flats insurance.
At Residentsline, our flats insurance policies are tailored to your needs; created for all sizes and types of blocks of flats and apartments. Our insurance cover also includes the option to include directors and officer's liability insurance, terrorism insurance, lift cover or legal expenses protection as part of your policy or as a separate policy if desired.

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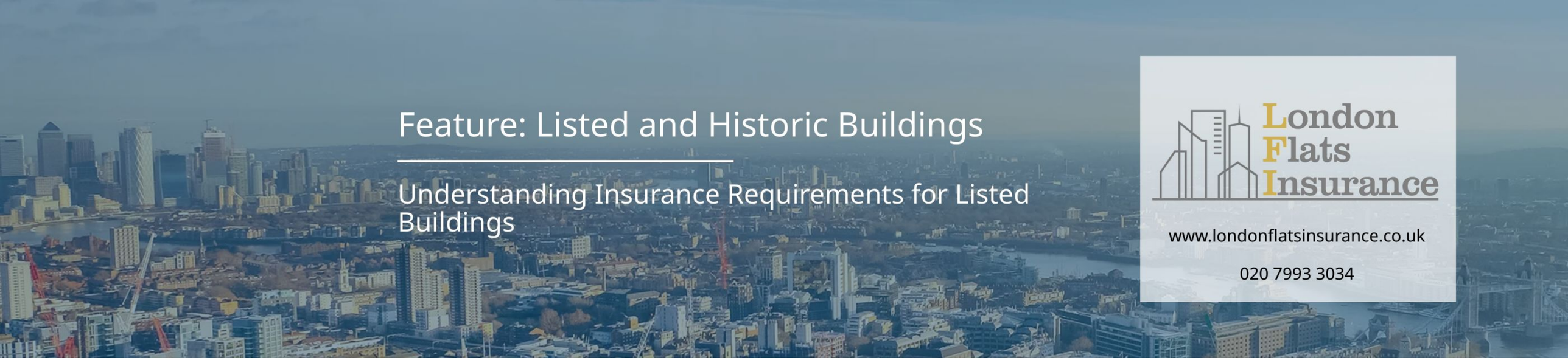

Feature: Listed and Historic Buildings

Understanding Insurance Requirements for Listed Buildings

London Flats Insurance

www.londonflatsinsurance.co.uk

020 7993 3034

For owners of listed buildings, insurance can get a bit tricky. As a vital part of the UK's cultural heritage, these buildings are diligently protected. Maintenance and improvements can only be carried out with express permission and in line with the building's original materials and design. The exacting requirements also apply if the property is damaged or destroyed.

The unique requirements and responsibilities faced by listed building owners mean that unique insurance coverage is a must. Ensuring compliance with preservation standards and mitigating potential liabilities will mean working with a trusted broker and surveyor.

Here we'll be explaining what information you'll need to gather for your broker and what to look out for in a potential policy.

What is a Listed Building?

A listed building is one that has been placed on the National Heritage List for England, or the equivalent lists in Scotland, Wales, and Northern Ireland. These buildings are recognised for their architectural or historical significance.



Classification is broken down into Grade I, Grade II*, and Grade II – with Grade I being of exceptional interest. All listed buildings are protected by stringent rules for their owners around maintenance, repairs and upgrades.

Why Do I Need Specialised Insurance?

Taking on a listed building means accepting responsibility for maintaining it in as close to its original state as possible. Most listed buildings are very old. Their construction may involve rare materials or techniques that are no longer commonplace for modern-day contractors. If the property suffers damage for any reason, you may well be legally obliged to restore the property to as close to its original state as possible – which can be extremely costly.

Standard home insurance policies are often insufficient for listed buildings due to their unique characteristics and the specialist repair work required if they are damaged. Listed building insurance is specifically designed to cover these complexities. It ensures that any repairs or restorations are done in line with the building's historical construction – often using traditional materials and methods.

Whilst there is no legal requirement to maintain appropriate insurance for a listed building or a building in a conservation area, legislation does impose various duties on the owner when it comes to repair and maintenance – making adequate insurance an absolute must.

Assessing the Right Level of Coverage

Determining the right level of insurance coverage for a listed building involves assessing it's rebuild cost, rather than its market value. The rebuild cost of a listed building is often higher than non-listed buildings because of the specialist construction techniques and materials required. It's important to have a professional valuation done by an experienced surveyor with great knowledge of listed properties to ensure adequate coverage.

Under-insurance is a common issue for all property owners but it's even more common with listed buildings due to the complex considerations required – specialist advice and periodic re-evaluation are strongly advised.

Mitigating Potential Liabilities

Owners of listed buildings should be proactive in reducing potential liabilities. Regular maintenance and checks are essential to prevent issues such as water damage from aging pipes, or electrical fires due to old wiring. Insurers may also require evidence of certain preventive measures as part of the insurance agreement – this not only protects the building but also has the potential to reduce your insurance premiums.

Insurance for Unoccupied Listed Buildings

Special consideration is needed for listed buildings that remain unoccupied for extended periods. These properties are at a higher risk of vandalism and damage from undetected maintenance issues.

Insurance policies for unoccupied listed buildings typically come with strict conditions and higher premiums. Owners must ensure they understand these terms to avoid being underinsured or facing unexpected refusals on claims.

Dealing with Insurance Claims

In the event of a claim, the process for a listed building can be more complex than for a typical home. Insurers will need to work closely with conservation officers and other experts to ensure that all repairs are appropriate. Owners should keep thorough records of all communications and dealings with their insurer and any conservation authorities involved in the repair work.

Conclusion

Owning a listed building is effectively a commitment to maintaining a piece of British heritage. This requires not only a love for the property, but also an understanding of the responsibilities involved – particularly regarding insurance.

By choosing the right insurance broker, surveyor and policy, staying informed about compliance issues and conducting regular maintenance, owners can protect their investment and ensure their historic homes are preserved for future generations.

For more from London Flats Insurance, click here.

To visit London Flats Insurances website, click here.

At London Flats Insurance, we only provide policies for blocks of flats and apartments, which means that we are specialists in this field. We know that each block of flats is different, which is why every flats insurance policy we offer is tailor-made to suit you, your block and its residents. Plus, we always work with A-rated insurance companies, so you can be sure that our insurance policies are a great solution when insuring your block of flats.

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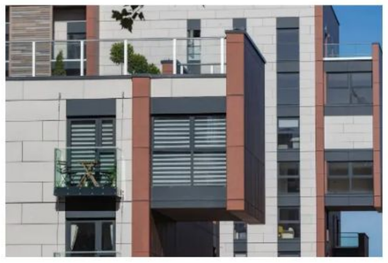

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Feature: Listed and Historic Buildings

Challenges of Maintaining Listed Buildings

www.blockinabox.co.uk

Listed buildings, including blocks of flats and apartments, are not only cherished for their architectural significance but also for the communities they house. However, maintaining and renovating these buildings come with a unique set of challenges for property owners and developers.



From navigating stringent regulations to managing costs, the process of preserving listed buildings requires careful planning and execution, particularly when dealing with blocks of flats and apartments.

Navigating Regulations

One of the most significant challenges in maintaining listed blocks of flats and apartments is navigating the complex web of regulations that govern their preservation. Listed status means these buildings are considered to have special architectural or historic interest, and alterations or renovations must be sympathetic to their character.

Obtaining planning permission for even minor alterations can be a lengthy and complicated process. Property owners and developers must work closely with conservation officers and historic building specialists to ensure that any proposed changes meet the required standards. This often involves extensive research into the building's history and original features, as well as careful consideration of materials and construction methods.

Unlike single-family homes, blocks of flats and apartments have the added complexity of multiple stakeholders and shared spaces. Any changes made to the building must consider the needs and preferences of all residents while also adhering to preservation guidelines.

Managing Costs

The cost of maintaining and renovating listed blocks of flats and apartments can be significantly higher than for non-listed properties. The need to use specialist materials and craftsmen, as well as the requirement to adhere to strict regulations, can drive up costs considerably.

In many cases, property owners and developers may be eligible for grants or other forms of financial assistance to help cover the cost of repairs and renovations. However, these can be difficult to obtain, and there is often stiff competition for available funds.

Furthermore, unexpected discoveries during the renovation process can further inflate costs. For example, uncovering structural issues or hidden damage can add significant time and expense to a project. In blocks of flats and apartments, these unexpected costs are multiplied, as they often involve shared infrastructure and common areas.

Preserving Authenticity

Preserving the authenticity of a listed block of flats or apartment building while ensuring that it meets the needs of modern occupants can be a delicate balancing act. Property owners and developers must carefully consider how best to adapt the building to meet modern standards of comfort and convenience without compromising its historic character.

This often involves finding creative solutions to overcome challenges such as inadequate insulation, outdated plumbing and electrical systems, and the need for additional space. In blocks of flats and apartments, where multiple units are involved, maintaining a consistent aesthetic approach and preserving shared spaces adds another layer of complexity.

Conclusion

Maintaining and renovating listed blocks of flats and apartments presents a unique set of challenges for property owners and developers. Navigating regulations, managing costs, and preserving authenticity are just some of the hurdles that must be overcome to preserve these important pieces of our architectural heritage.

However, despite the challenges, the preservation of listed buildings is vital to ensuring that future generations can continue to enjoy and appreciate our rich architectural history. With careful planning, expert guidance, and consideration for the needs of all stakeholders, it is possible to successfully maintain and renovate listed blocks of flats and apartments while preserving their historic character for years to come.

At Block in a Box, we have partnered with Earl Kendrick Group for any Historic Building Repairs and Maintenance requirements you may have.

Visit our website to read more and to request a quote today.

Or call our team on 0333 0154 145 or email info@blockinabox.co.uk and we will be in touch.

Block in a Box has been created to assist self-managed Residents' Management Companies, Right to Manage Companies and Residents' Associations, their blocks of flats and the leaseholders that live in them by providing a mix-and-match toolbox supplying all the services you need.

We designed it with a steering committee of directors and association members to provide something that would truly help.

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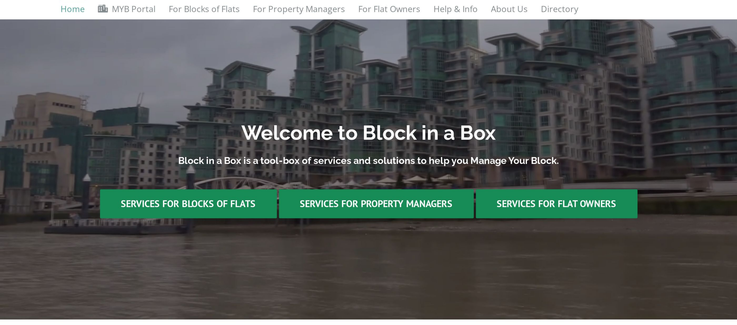

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Fire Risk Assessments

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Feature: Listed and Historic Buildings

Innovations in Sustainable Design for Historic Buildings

www.flatlivinginsurance.co.uk

Renovating a historic, listed building can be tricky.

Architects and the craftspeople involved have a lot to consider. Allowable materials, construction techniques, sustainability and aesthetics all come into play. Advancing technology and innovative solutions are starting to ease the burden placed on listed building owners.

The people they entrust to maintain and improve their properties now have access to a new era of possibilities.

Here we'll be exploring how modern technology and materials can be utilised while continuing to preserve historical authenticity.



A Quick Reminder of What it Means to be "Listed"

If a building is "listed", it means that it will appear as an entry on 'The National Heritage List for England' (NHLE), held by Historic England. They use a grading system based on the importance and age of the building in question:

• Grade I: Buildings of 'exceptional interest'- these account for only 2% of properties on the list.
• Grade II*: These are particularly important buildings of more than just 'special interest'. They account for around 6% of listed buildings.
• Grade II: Around 92% of entries fall into this category. These are buildings of 'special interest' which warrant preservation – most domestic listed buildings fall into this category.

It's important for owners to note that not all listed buildings are protected in their entirety. If the listing doesn't mention any particulars, then yes, the protection extends to the entire property (including the interior). However, in some cases, parts of the building may be excluded from the listing. These will be detailed within the property entry.

Because all listed buildings are unique, what is covered by a listing can vary quite widely – Historic England advise that you check all details with your local authority before making a purchase or any alterations.

What Responsibilities Do Owners Face?

Taking on a listed building means accepting responsibility for maintaining it in as close to its original state as possible. Special permissions are needed for any alterations, and Historic England advise that owners of listed buildings speak to their Local Authority Conservation Officer about any plans they have for alterations before any financial outlay is made and certainly before any work commences:

"If you want to alter or extend a listed building in a way that affects its character or appearance as a building of special architectural or historic interest, or even demolish it, you must first apply for listed building consent from your local planning authority." - Historic England

While repairs must comply with modern Building Regulations, original materials and methods must be used wherever possible and the original aesthetics must be maintained. As you can imagine, repairs of this nature require specialist craftspeople, and often rare materials – both of which can be expensive.

Considering Longevity, Sustainability and Compliance

Advancements in technology and materials are proving that old buildings can embrace a new era; one based in energy-efficiency and environmental friendliness. But advancement doesn't mean compromise – respecting the character and history of the building must come first.

Balancing Preservation with Sustainability

When renovating listed buildings, the goal will always be to make buildings more energy-efficient and environmentally friendly, while ensuring their defining characteristics remain intact.

One of the key challenges in sustainable renovation is improving energy efficiency without altering the building's appearance.

Traditional buildings often lack proper insulation, leading to excessive energy consumption for heating and cooling. Innovative solutions such as internal wall insulation, draught-proofing, and secondary glazing can improve energy efficiency while keeping the exterior intact.

Renewable energy solutions are part of sustainable design in historic buildings, but introducing solar panels or wind turbines can be visually intrusive. Integrating these technologies discreetly can involve using solar tiles (which mimic traditional roofing materials), installing ground source heat pumps which are largely underground, and finding modern solutions for monitoring and managing energy consumption.



Smart thermostats and energy management systems can optimise energy use based on occupancy patterns – reducing waste without any visible impact on the building. The former allows precise control over heating and cooling, adjusting temperatures based on occupancy. Integrated systems provide real-time data on energy use, enabling building managers to identify inefficiencies and optimise energy consumption.

Sustainable Materials and Techniques

Renovation projects often utilise sustainable materials and techniques which often naturally align with the building's historical context. Traditional building materials can offer environmental benefits while also maintaining historical authenticity.

Lime mortar is a great example. This traditional building material is more breathable and flexible than modern cement, making it ideal for historic buildings. It allows moisture to evaporate, preventing damage and improving indoor air quality.

Using recycled materials such as reclaimed wood or brick reduces environmental impact and blends well with historic settings – perfect for use in listed building renovation projects.

Summary

Sustainable design and renovation in historic buildings requires a thoughtful approach that respects the past while embracing the future. Innovations in energy efficiency, renewable energy, smart technologies, and sustainable materials show that historic buildings can meet modern sustainability goals without losing their unique character. By balancing preservation with sustainability, these innovative approaches pave the way for a harmonious integration of old and new.

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Blocks of Flats Insurance

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Terrorism Insurance

Flat Living Insurance is a trading name of Residentsline Limited who is Authorised and Regulated by the Financial Conduct Authority: 305998

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Feature: Listed and Historic Buildings

Strategies for Preventing Loss and Damage in Listed Buildings

ManageYourBlock™

www.manageyourblock.co.uk

tel: 0333 577 9070

Owning or managing a listed building involves not only the joy of preserving a piece of history but also the challenge of preventing loss and damage. These special, protected buildings can bring their owners and the public so much joy, but they can also present a challenge to maintain and protect.

Implementing effective strategies to mitigate risk can help reduce insurance claims and, potentially, insurance premiums. Here we'll be providing practical strategies for property owners and managers to safeguard their historic properties.



Regular Maintenance and Inspections

The key to preventing damage in listed buildings is regular maintenance and inspections. Due to their age and construction, these buildings often require more frequent checks than modern structures.

Regularly inspecting and cleaning gutters will prevent water overflow and subsequent damage to the fabric of the building. Roofs should be checked for missing, loose, or damaged tiles that could lead to leaks.

Cracks in the walls and/or signs of moisture can indicate structural issues. Early detection of issues with the walls or foundations can prevent serious damage and spiralling costs. Ensuring that all plumbing and electrical systems are regularly checked (and updated if necessary) is also crucial to prevent water damage, fires, and other hazards.

For some insurers, maintenance agreements form part of the policy. They require evidence of certain maintenance checks to validate the policy and keep premiums to a minimum.

Measures

Listed buildings are often constructed from outdated materials which can be particularly flammable. Fire safety is therefore a critical concern. Installing and maintaining adequate smoke alarm systems and fire extinguishers is vital. All occupants, visitors and staff should be fully aware of your fire safety processes.

Portable heaters should be avoided, and fireplaces must be well-maintained and used safely. Chimneys and flues should be inspected regularly to prevent chimney fires and ashes need to be disposed of appropriately.

Security Enhancements

Theft and vandalism are risks for any property, but listed buildings can be particularly vulnerable due to their location, accessibility, and high-profile nature. Comprehensive security systems can reduce your risk.

Your system should include high quality, well positioned CCTV cameras and an organised system for storing recordings. Alarms and motion sensors for security lighting also act as great deterrents. Well lit, high-quality recordings will enable you to quickly address any incidents that may occur.

Well-maintained physical barriers such as gates, fences and secure windows and doors will make access as difficult as possible. Security film on any glass will prevent shattered windows, and modern locks should be used wherever possible.

Environmental Controls

The internal environment can affect a listed building's condition, with unstable temperatures and humidity leading to deterioration over time. High humidity and poor ventilation can lead to mould and wood rot – especially in kitchens and bathrooms. Significant changes in temperature can cause materials to expand and contract, creating structural damage if allowed for long enough.

Modern sensors and environmental control systems can be used to reduce the risk of damage. They allow you to consistently monitor the building's temperature and humidity levels so you can take action to correct any dips or increases that could lead to harm.



Professional Assessments and Advice

Given the complexities associated with historic buildings, seeking professional advice can be invaluable. Best practise would include working with specialised structural engineers and surveyors who can carry out regular assessments. Their reports can identify any potential issues before they turn into serious problems.

If renovation or repair work is required, working with a conservation specialist can give you the assurance that you're using the correct materials and methods to comply with preservation standards.

Training and Awareness

For those involved in the management and upkeep of listed buildings, appropriate training is essential. Regular sessions for staff and volunteers can increase their awareness of the specific needs and vulnerabilities of the building. They should also be kept up to date with any emergency preparedness systems you have in place such as your fire or flood response processes.

Conclusion

Preventing loss and damage in listed buildings is not just about reducing insurance claims and premiums; it's about safeguarding the UK's cultural heritage for future generations.

Through diligent maintenance, strategic upgrades, and a commitment to preservation, property owners and managers can ensure these historic structures withstand the test of time. The key is proactive care and expert advice; ensuring that every measure taken is in line with the unique needs of your listed building.

For more from Manage Your Block, click here.

Manage your Block has been created to assist Residents' Management Companies, Right to Manage Companies and Residents Associations to self-manage their block.

It's a secure, easy-to-use portal that offers access to your block's details at the touch of a button. Designed to make your life easier, it saves you time and offers a fast and efficient interface to connect you, your residents, and your block.

manageyourblock.co.uk | info@manageyourblock.co.uk | 0333 577 9070

ManageYourBlock™

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ManageYourBlock™

Self management software for blocks of flats!

VISIT OUR WEBSITE



An **online portal** designed for RMC's, Directors and Owners of apartment blocks. With Manage Your Block, you can update, control and navigate your documents all in a user-friendly hub. This is accessible through any device at a touch of a button 24/7 personalised to suit your needs.

Who is Manage Your Block For?

Manage Your Block is a nifty online portal specifically designed for anybody managing a block of flats, including:

- Residents' Management Companies
- Right to Manage Companies
- Residents Associations

Do you want to make managing your block easier? Consider our trusted software solution used by thousands of professionals nationwide!

Tel: 03335779070 Email: info@manageyourblock.co.uk

OUR FEATURES

Diary

Set diary reminders to ensure you don't forget anything.

Documents

Securely hold all your block's documents in one place. Examples of what you may want to store include: copy leases, financial records, fire evacuation procedures, along with other day-to-day procedural documents.

Notes

Make sure you have an audit trail by adding notes for anything important.

Quotes

Request quotes from your preferred contractors or use one of our recommended specialists. You can also issue work orders to accept quotes.

Save

Our trustworthy online space lets you keep your most important documents safe, and you will have access day and night, wherever you are.

Contractors

Keep a list of your key contractors, for example, plumbers, decorators, gardeners, window cleaners in one place.

Contacts

All the owners and residents in your block can be added to your contact list, so you can keep track and update it. You'll always have all of this contact info at your fingertips.

Calendar

Record key dates and reminders, for example insurance renewal date, health & safety risk assessment due date, date to send out service charges.

Alerts

Broken down lift? Power shortage? Local crime issues? Provide instant alerts out to all residents with one simple alert.

The Importance of Directors and Officers Liability Insurance

Protect your Directors with Residentsline
www.protectyourdirectors.co.uk

Belinda Bagnall, Managing Director of Residentsline explores the significance of Directors' and Officers' Liability Insurance for your Residents' Management Company.

As a member of a Residents' Management Company, you have a range of responsibilities to ensure the smooth running of your block of flats.



This may include:

- Finance and accounting
- Service charges
- Insurance needs
- Maintenance
- Inspections
- Major works and reparations

This can sometimes be an exhaustive list; it requires a great deal of planning and experience to successfully manage a block of flats or apartments. As such, it can often be easy to make mistakes.

A vital thing to remember here is that, whilst mistakes often happen, any mistakes which cause an incident such as damage or personal injury can result in legal action being taken against the Residents' Management Company.

This is because the directors and officers of the Residents' Management Company are held liable for any decisions taken when acting in their position.

This may seem unfair. After all, being a director or an officer of a Residents' Management Company is a voluntary role which requires a lot of time and effort on behalf of the residents in the block. As such, it can be difficult to understand how directors and officers can be penalised so heavily. Regardless, the fact remains that directors and officers require suitable protection in case of legal action being taken against them.



Directors' and Officers' Liability Insurance

This type of insurance cover provides protection towards members of Residents' Management Companies and their legal liability. Underwritten by AVIVA Insurance, our policy protects directors and officers against the cost of potential claims for alleged wrongful acts.

These may include:

- Breach of trust
- Breach of duty
- Neglect/error/omission
- Misstatement
- Libel and slander
- Breach of warranty of authority
- Wrongful trading

To get Directors and Officers Liability insurance cover today, please visit the Protect Your Directors with Residentsline website.

Did you know that by using our portal to get your quote and to place cover, you can save on admin fees?

At Residentsline, our flats insurance policies are tailored to your needs; created for all sizes and types of blocks of flats and apartments. Our insurance cover also includes the option to include directors and officer's liability insurance, terrorism insurance, lift cover or legal expenses protection as part of your policy or as a separate policy if desired.

residentsline.co.uk | info@residentsline.co.uk | 0800 281 235

Protect your Directors with Residentsline

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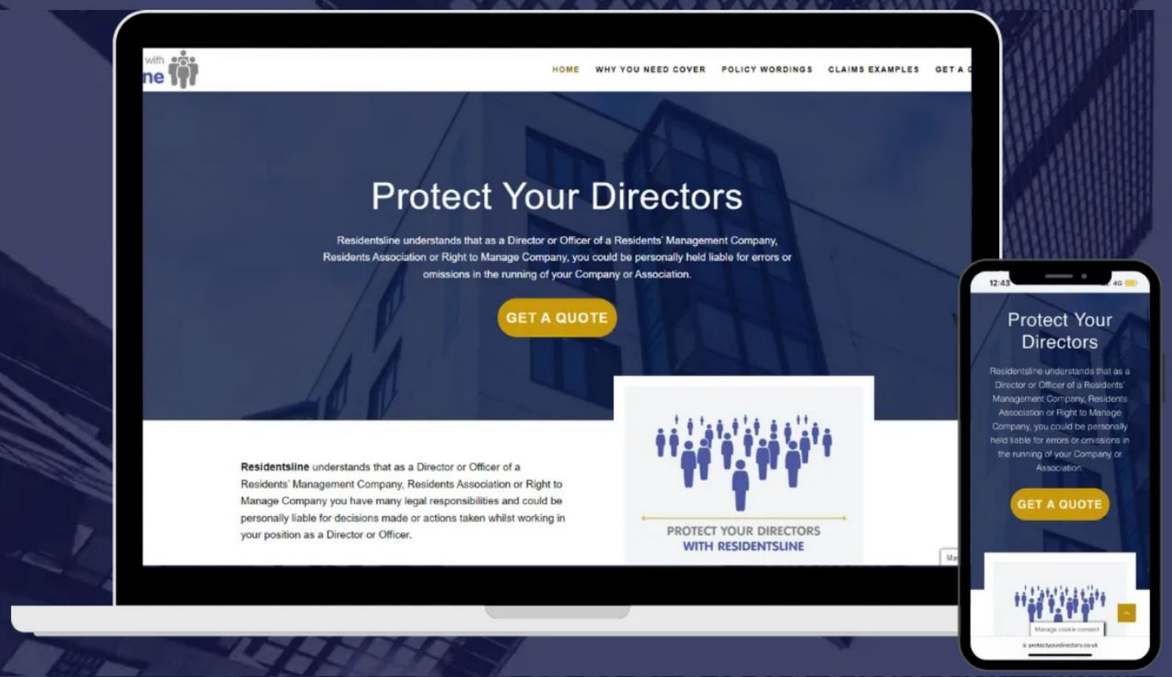
Protect your Directors with **Residentsline**

CLICK HERE TO GET A MANAGEMENT LIABILITY INSURANCE QUOTE AND COVER TODAY!

One mistake or misjudgement could end up being expensive. Get a quote for Directors & Officers Liability Insurance with us today, a specialist insurance broker you can trust.



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HELPING YOU
BUILD YOUR FUTURE,

BLOCK
BY
BLOCK



"Stella was great throughout the whole process. She was very easy to speak to, always answered my calls and emails promptly. Excellent service!"

- Melissa Bagot

"With Alice's help and using the information she gave me I have secured a role with an amazing company and I couldn't be more grateful. If you're looking for someone with a wealth of knowledge and a real passion for what they do I couldn't recommend Alice enough"

- Max Braun

www.blockrecruit.co.uk

Featured Job Vacancies

Are you looking for a new role, maybe a step up the career ladder? Take a look at a range vacancies in the block management sector from Block Recruit.

BLOCK RECRUIT

Block Manager

Location: East Sussex

Salary: £30,000 - £45,000

Tell me more

On-boarding Co-ordinator within Block Management

Location: South West London

Salary: £35,000 - £45,000

Tell me more

Block Manager

Location: West Sussex

Salary: £30,000 - £37,000 + £3,000 car allowance (£40K Max)

Tell me more

Block Manager with Business Development

Location: Dorset

Salary: Circa £55,000

Tell me more

Property Manager

Location: Kent

Salary: £26,000 - £30,000

Tell me more

Senior Client-Side Property Manager

Location: South East London

Salary: £60,000 - £75,000

Tell me more

Property Administrator

Location: Hampshire

Salary: £20,000 - £23,000

Tell me more

Block Manager

Location: Central London

Salary: Up to £40,000

Tell me more

Block Recruit

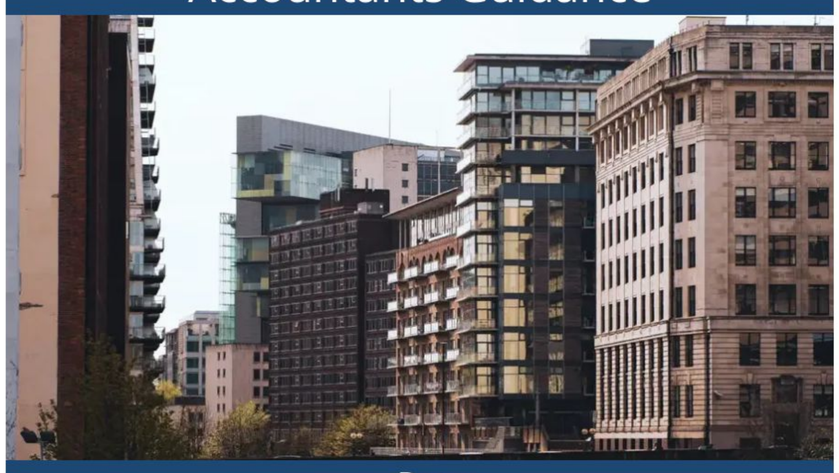
Block Recruit specialise in providing property professionals to all areas of the block management industry in the UK.

Visit the Block Recruit website to find out about other vacancies they have and how they can support you in finding the perfect new role.

BLOCK RECRUIT

Upcoming TPI Training Courses

TC11: Residential Service Charge Accountants Guidance



Dates

Mon 17 June 2024

Mon 18 November 2024

Who should attend?

- Accounts staff who need to understand the requirements of lease and law in the production of accounts
- Property managers whose input is required during the service charge year from their clients
- It may also be suitable for senior managers who are responsible for the corporate strategy within their accounts department

Book your place

TC114: Introduction to Being an RMC/RTM Director



Dates

Mon 15 July 2024

Course Contents

Each flat owner is typically a member or shareholder in the RMC and members are appointed from amongst their number to become Directors. The RMCs are then run by these Directors. The duties of the company towards each Leaseholder are set out in the Leases for each flat. There is a mix of contractual duties, such as repairs, maintenance, insurance, and service charge accounting, and statutory duties, including setting reasonable levels of service charges and consulting on major works.

Book your place

TC66: Introduction to Fire Safety for Property Managers



Dates

Wed 26 June 2024

Who should attend?

The course is suitable for anyone who has a role in responding to, managing or overseeing building safety of those properties in scope of the Building Safety Act.

Course Contents

The aim of this course is to help you, your team and your clients understand who has accountability for the development of a Building Safety Case Report but also understand what is required, what support can be offered to AP/PAPs and how best to manage building safety in the long term.

Book your place

TC110: Leaseholder Protections And Landlord's Certificates And Leaseholder Deeds Of Certificate



Dates

Wed 10 July 2024

Who should attend?

Those dealing with the scope of the Leaseholder Protections regulations, and involved in collating/reviewing Leaseholder Deed of Certificates and/or have been instructed to support or compile Landlord Certificates.

A half day course exploring the leaseholder protections under the Building Safety Act

Book your place

TC1: Introduction to Residential Property Management



Dates

Tue 9 July 2024

Mon 16 September 2024

Tue 8 October 2024

Who should attend?

This introductory course is ideal for those new to the sector with less than six month's experience in residential property management and those moving from letting to residential leasehold management.

Book your place

TC116: Resident Engagement Strategies



Dates

Wed 19 June 2024

Who should attend

The course is suitable for anyone who has a role in managing leasehold properties.

Course Contents

- Introduction to The Building Safety Act 2022
- Understanding the difference between accountability and responsibility
- What is resident engagement
- And much more!

Book your place

To view TPI's full list of training courses, **click here.**

Get in touch

Website: https://www.tpi.org.uk/

The Property Institute

Upcoming Events

ACE Awards 2024



Date: Friday 21st June 2024

Venue: Old Billingsgate, 1 Old Billingsgate Walk, London EC3R 6DX.

ACE Awards 2024 will be heading back to the Roaring '20s with a Great Gatsby theme. Get creative and start planning your frocks & tuxedos for an evening of glitz and glamour!

The 2024 ACE Awards will recognise excellence and exceptional achievements by UK managing agents, their suppliers and the work of their people in improving the lives of millions of leaseholders.

Book your tickets

The Active Bystander Conference



Date: 10th July 2024

Location: Hartpury University in Gloucester

The Active Bystander Conference by the Hollie Gazzard Trust

The conference promises a dynamic day of discussions led by prominent industry and academic experts, focusing on the empowerment that an Active Bystander programme can bring.

The goal is to inspire a culture of intervention and support, equipping attendees with the tools needed to stand up against harassment, abuse, and violence.

Register here

TPI Annual Conference 2024



Date: Thursday 24th October 2024

The Property Institute Annual Conference 2024 attracts key decision-makers from TPI Company and Individuals members as well as Government representatives and key sector stakeholders.

Delegates get an in-depth look at the fundamental issues of block management and updates on the latest technical and legal matters from leading industry figures as well as the opportunity to debate major sector topics. It provides the ideal networking environment.

Early Bird Tickets Coming Soon

FIRE Conference 2024



Date: Thursday 24th October 2024

A one-day conference for anyone involved in fire safety to come together to discuss and debate the major challenges affecting the sector.

Organised collaboratively between the Fire Protection Association (FPA), Institution of Fire Engineers (IFE), the National Fire Chiefs Council (NFCC), and the Fire Sector Federation (FSF), this annual event will be in person or online.

Register here

ARMA SAVE THE DATES - 2024



- **The Property Institute Regional -** Southampton - 5th September
- **The Property Institute Regional** - Newcastle - 12th September
- **The Property Institute Regional -** Birmingham - 7th November
- **The Property Institute Regional -** Manchester - 12th November
- **The Property Institute Regional -** Bristol - 26th November
- **The Property Institute Regional -** London - 5th December

Find the list of event here!



Directories

Find Managing Agents, Suppliers and ALEP Professionals who know and understand leasehold property.



01
Flat Living Directory

02
Recommended Suppliers

03
Find an ARMA Member



FlatLiving® Directory

FIND SERVICES FOR YOUR BLOCK OF FLATS

0808 175 1371 www.flatlivingdirectory.co.uk



Find a Supplier

Featured suppliers from

BLOCK in a BOX



Accounting Solutions

Flat Management Co. Accounts Limited

Find out more

Alternative Accommodation

ICAB Insurance Claims Accommodation Bureau

Find out more

Asbestos Surveying and Management, Fire Risk Assessments and many more

4site®

Find out more

Broadband Services

4thUtility

Find out more

Cladding Consultancy, Commercial Property Surveying

EarlKendrick Project & Building Consultancy

Find out more

Cyber Security Training

intelectGroup eLearning

Find out more

Neighbourly Advice: Daylight, Sunlight and Overshadowing

McQuade Neighbourly Matters

Find out more

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Enfranchisement

BRADY SOLICITORS

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Fire Risk Appraisal of External Walls, Higher-Risk Building Registration and Representative for Cladding Remediation Funding

FRC an RSK company

Find out more

FPRA

FPRA FEDERATION OF PRIVATE RESIDENTS' ASSOCIATIONS

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Historic Building Repair, Housing Assoiations, Party Walls, Planned Maintenance Programs and License to Alter

EarlKendrick Building Surveyors

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Insurance

FlatLiving Insurance

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Insurance

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Lease Extensions and Lease Variation

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LEASE The Leasehold Advisory Service

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Rooftop Extensions

Sussex Airspace Developments

Find out more

Rope Access Surveys and Safety Testing

RopeAccess Surveys

Find out more

Service Charge Arrears

pdc

Find out more

Smartlink45 Prepayment Meters

SmartLink45®

Find out more

Utilities

RMC utilities specialists in resident management energy

Find out more

Water leak detection and solutions

Waterguard

Find out more



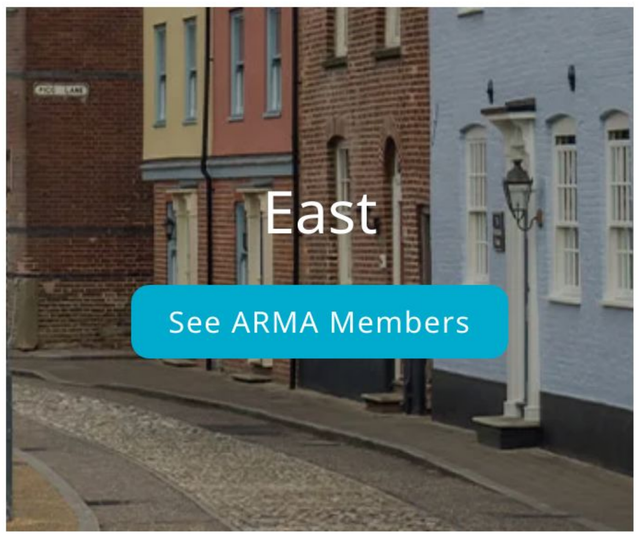
Find an ARMA Member

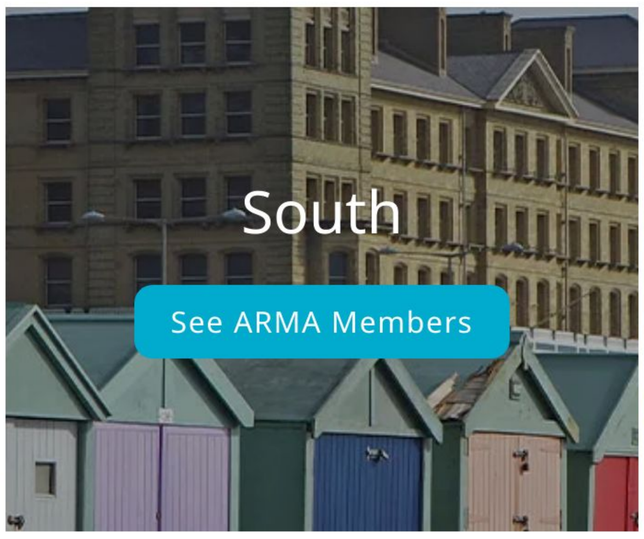


Are you considering a new managing agent?

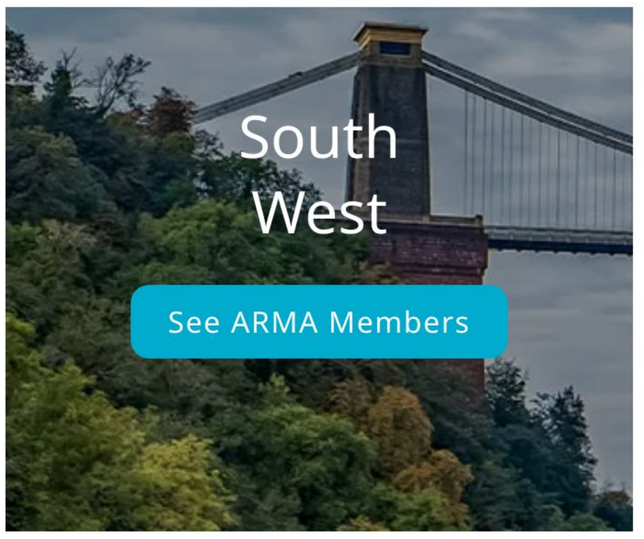
Below are a list of ARMA (Association of Residential Managing Agents) members by region.

A managing agent that is a 'member' of ARMA will have successfully achieved ARMA Accreditation and is required to comply with the ARMA Bye-Laws, RICS Code, relevant legislation and ARMA Consumer Charter & Standards.





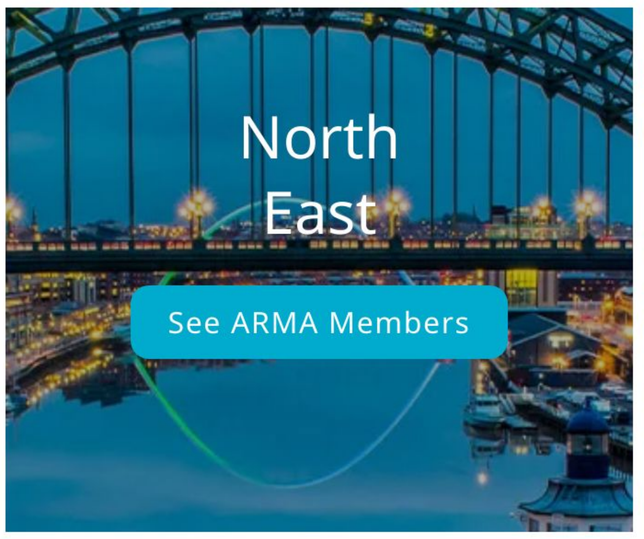


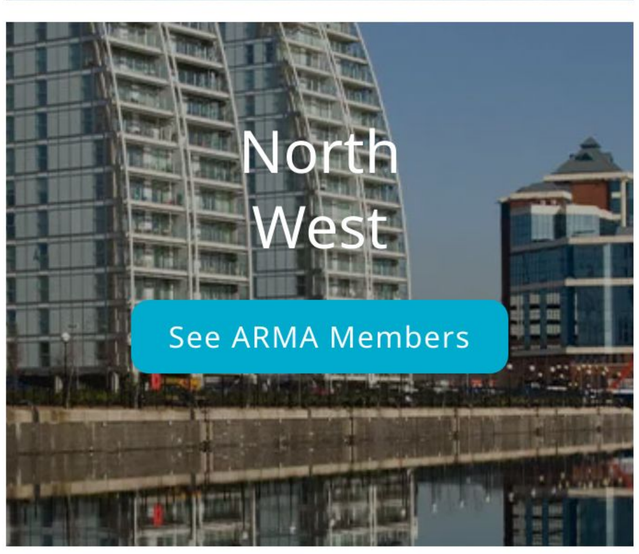


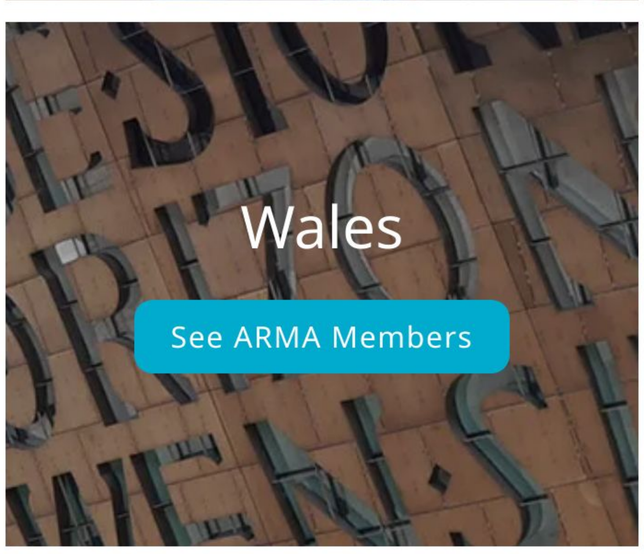


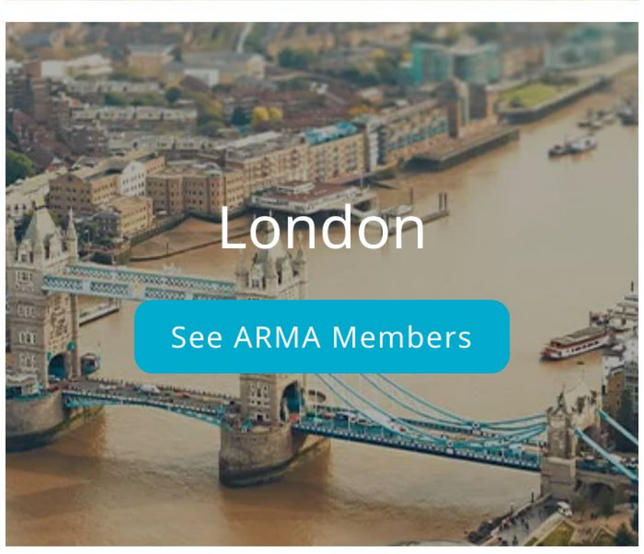




















ALEP ASSOCIATION OF LEASEHOLD ENFRANCHISEMENT PRACTITIONERS

ALEP - the voice of the enfranchisement sector promoting best practice

Leasehold enfranchisement includes the processes of lease extension, freehold acquisition and correction of management problems within leasehold properties.

The Association of Leasehold Enfranchisement Practitioners (ALEP) serves as the leading organisation representing professionals working in this sector.

Established in 2007, ALEP was formed to bring together firms working within leasehold enfranchisement under one, all-encompassing membership organisation. Barristers, managing agents, project managers, solicitors and valuers all form part of the ALEP community.

Our Work

One of ALEP's key aims is to work with member firms within this sector to raise and maintain standards across the board. The Association holds regular seminars and networking sessions, as well as its popular annual Conference and Lecture events, all with the objective of bringing the sector together to share ideas, discuss key issues and encourage best practice.

ALEP also acts as the 'voice of the sector' and represents its members' views to the wider industry, the media and to the general public. More recently, ALEP is proud to have been invited by the government to contribute to several consultations concerning the future of leasehold enfranchisement.

Our Members

ALEP has 260 highly respected member companies and individual barristers – this equates to just under a total of 1,000 professionals – all of whom operate within the enfranchisement sector and who regularly come together to network, compare notes and agree best practice.

ALEP accreditation acts as a badge of assurance for leaseholders and freeholders alike when looking for professionals to handle their enfranchisement transactions. All members are vetted to ensure they are experienced in dealing with the various and complicated issues surrounding leasehold enfranchisement.

Areas ALEP members can help with include:

- Extending a lease
- Leaseholder vs. freeholder disputes and resolutions
- Informal lease extension implications
- Marriage value
- Collective enfranchisement
- First-tier Tribunals
- Leasehold Valuation Tribunals
- Over-inflated ground rent, service charges and insurance

For more information and to find an ALEP member in your area please visit: www.alep.org.uk



Find an ALEP Member

ALEP (Association of Leasehold Enfranchisement Practitioners) member firms are rigorously vetted so you can be confident that they have a proven track record in leasehold enfranchisement.

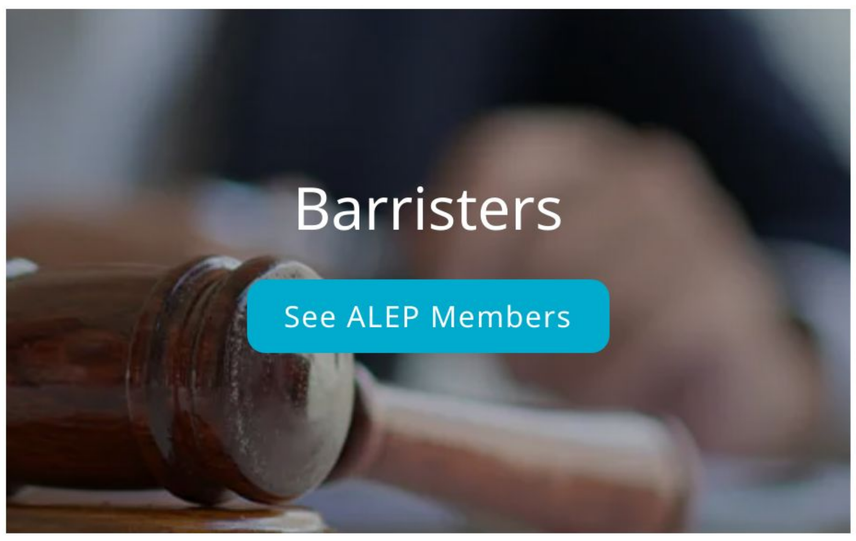


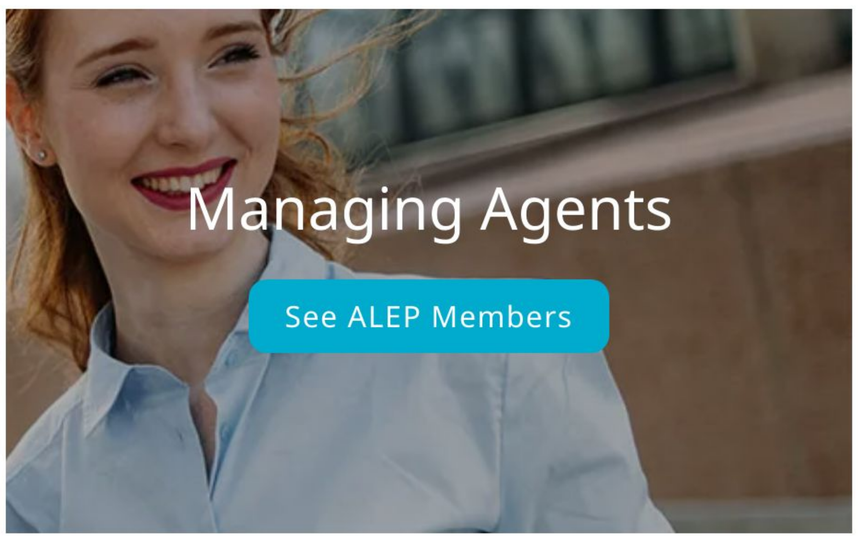
ALEP members can advise or assist with:

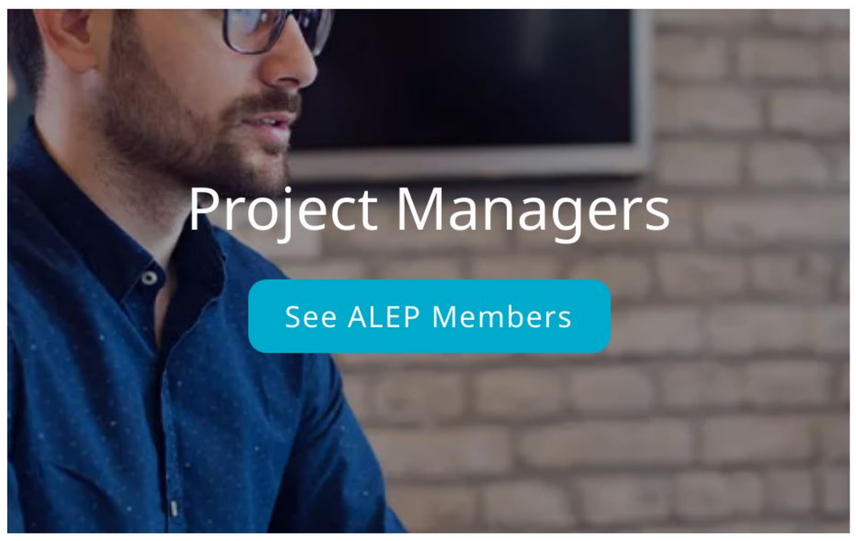
- Extending a lease;
- Buying a share or freehold of a building;
- Exercising the Right to Manage;
- Section 5 Notice;
- Dealing with freeholder or leaseholder disputes

Below are details of ALEP Professionals (alphabetically) in the following areas:

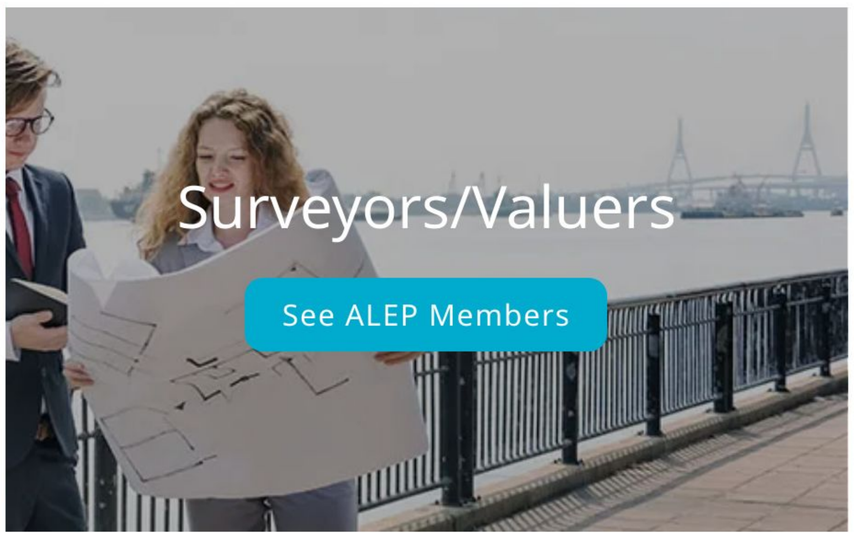
- Barristers
- Managing Agents
- Project Managers
- Solicitors/Legal
- Surveyors/Valuers



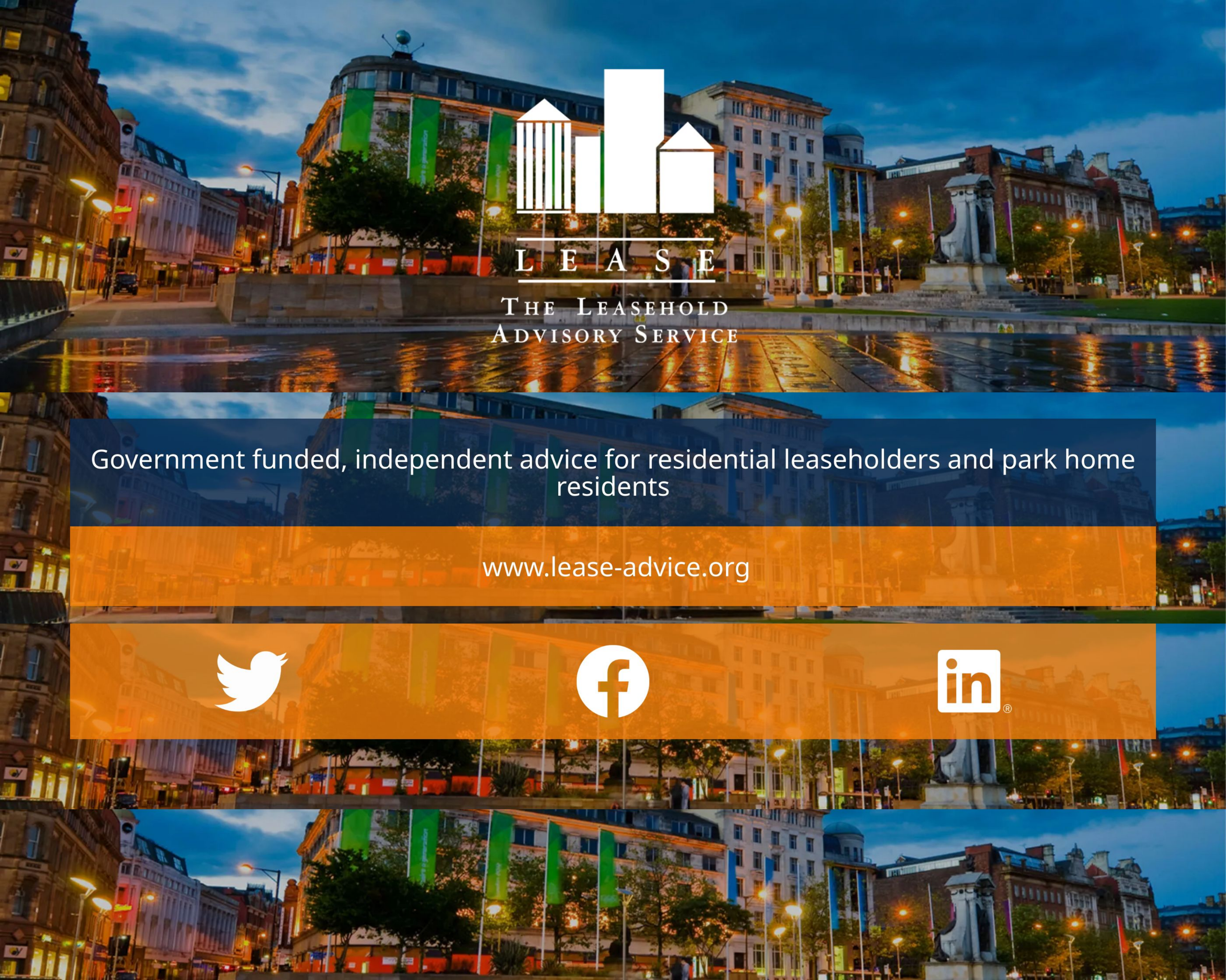








ALEP
ASSOCIATION OF LEASEHOLD ENFRANCHISEMENT PRACTITIONERS



Government funded, independent advice for residential leaseholders and park home residents

www.lease-advice.org

We hope you enjoyed this issue of Flat Living Magazine

You can read more on the Flat Living website which has over 1,500 articles for Residents Management Companies, Directors and Managing Agents.

Flat Living Website

Social Media
Keep up to date with all the latest by following us on social media.

Linktree

Sign Up
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Sign Up

Contact Us
We would love to hear from you if you have a question or would like to find out about working with us.

Contact Us

Help, Information, Advice and Guidance for Those that Live in, Own or Manage Blocks of Flats.

FlatLiving®

First name

Last name

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Send me the latest Flat Living Magazine issue each month!

Submit



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- Berkshire Hathaway Home Services Kay & Co London 020 7467 2027 Full Member
- Bold and Reeves Limited London 020 7408 7590 Full Member
- Brunsfield Ltd London 020 3601 7676 Full Member
- Burlington Estates (London) Limited London 020 7499 3207 Full Member
- Castlereagh Management Limited London 020 7258 9670 Full Member
- Homes Property Management Limited London 020 8960 7730 Full Member
- KDG Property Ltd London 020 7887 6413 Full Member
- Lanigan Estates Ltd London 020 7223 0851 Full Member
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- Horizon Management — Sheffield — 0300 030 1035 — Full Member
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- Inspired Property Management Limited — Doncaster — 01302 729 500 — Full Member
- LIV Group Limited — Leeds — 0113 244 2444 — Full Member
- Mulberry PM — York — 01904 655200 — Full Member
- Omnia Estates Ltd — Sheffield — 0114 2792840 — Full Member
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- Freemont Property Managers Limited Lymington 01590 610 555 Full Member
- GH Property Management Services Limited Southampton 03453 080 988 Full Member
- Hobdens Property Management Ltd Littlehampton 01903 724 040 Full Member
- Hunters Estate & Property Management Ltd Burgess Hill 01444 254 400 Full Member
- Itsyourplace Limited Fleet 0330 660 0699 Full Member
- Kites Property Services Limited Camberley 01252 837514 Full Member
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- MJ Staples t/a Deacon Crickmay Asset Mgmt Horsham 01403 218 975 Full Member
- Minster Property Management Limited Wimborne 01202 883 360 Full Member
- MSMS - McCarthy & Stone Management Services Bournemouth 01202 508 190 Full Member
- Napier Management Services Limited Fordingbridge 01425 650 656 Full Member
- Rebbeck Brothers Ltd Bournemouth 01202 438 908 Full Member
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- Hillsdon Management Ltd Sidmouth 01395 517950 Full Member
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• Haymarket Block Management	Salford	01615 490 909	Full Member
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• Matthew's Block Management Limited	Chester	01244 346 226	Full Member
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• Regency Estates	Bolton	01204 695 919	Full Member
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- Redwood Estate Management Ltd London 0203 962 7222 Full Member
- Rounce & Evans Property Management Ltd King's Lynn 01553 401580 Full Member
- St Andrews Bureau Ltd Cambridge 01223 352 170 Full Member
- TLC Estate Agents London 0207 370 4000 Full Member
- TW Property Block Management Tunbridge Wells 01892 530 109 Full Member
- Watsons Norwich 01603 226500 Full Member



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• Butlin Property Services	Leicester	0116 2703705	Full Member
• Kingston Real Estate (Property Management) Ltd	Northampton	01604 631 551	Full Member
• Orchard Block Management Services Ltd	Northampton	01604 620 422	Full Member
• PMD Block Management Ltd	Kettering	01536 513 978	Full Member



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- Amber Management — Ware — 0800 567 7567 — Full Member
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- Compass Block Management Birmingham 0121 236 5757 Full Member
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- Exclusive Property Management Ltd Solihull 0121 707 7727 Full Member
- Hadrian Property Management Company Limited Lichfield 01543 410922 Full Member
- KT Management Co (UK) Ltd Merry Hill 01384 573 637 Full Member
- KWB Property Management Limited Birmingham 0121 233 2330 Full Member
- Longlease Property Management Stratford upon Avon 01789 333 464 Full Member
- Mainstay Residential Ltd Worcester 07900 822309 Full Member
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• Thomas Dogger	BN Surveyors Ltd	020 7101 3382
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• Wayne Norcliffe	Castle Surveyors Limited	0800 246 1002
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• David Coleman	David Coleman & Company	0121 655 0998
• David Graham	David Graham (Chartered Surveyors)	07973 364162
• Wilson Dunsin	Dunsin Surveyors	020 7233 6762
• Jackie Collis	Each Side Leasehold	07842 395767
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• Chris Clark	Ely Langley Greig	023 8027 4211
• Angus Fanshawe	Fanshawe White	020 7099 8465
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• Jenni Freeborn	Graves Son and Pilcher	01273 321123
• David Toogood	Harding Chartered Surveyors	07808 161 463
• Harriet Fleming	Harriet Fleming Surveyors Ltd	01727 750045
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• Kevin Broadhurst	Jackson Green & Preston	01472 311113
• Adrian Hau	John D Wood & Company	020 7802 3279
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• Gavin Lewis	Kingston Morehen Chartered Surveyors	01323 411088
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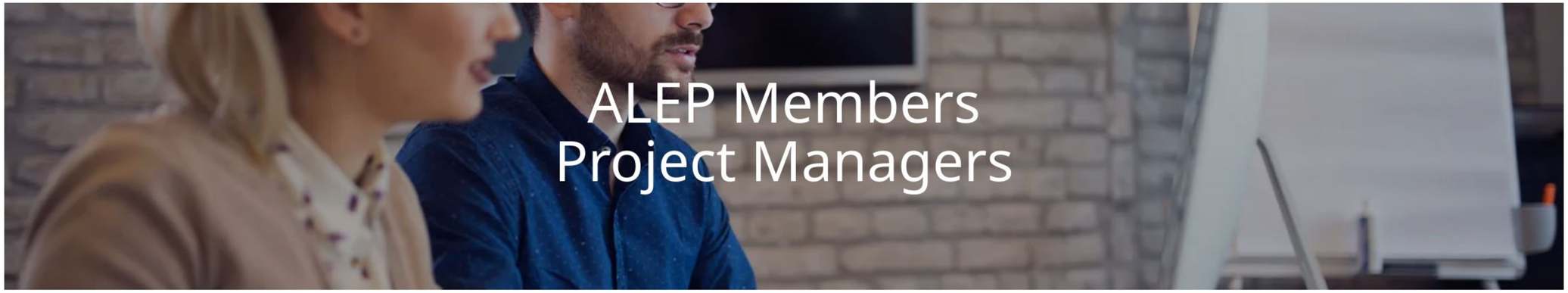

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