



Block Management Proposal

Jebb Avenue, Brixton, London, SW2 5XL

www.strangfordmanagement.com

What we know about you

Jebb Avenue Management Company Limited is the Freehold company responsible for the management of the 56 residential apartments located in Brixton. Following a site tour, we understand that the management company is seeking to engage a new managing agent to resolve a number of issues including poor speed of resolution to day to day issues, lack of financial transparency, clarity on lease matters, and improving the current contracts in place, providing an overall upgrade to the current management structure.

Taking these points into consideration, this proposal shall define what you can expect from our unique management service, the resources we use to provide a 24 hour, 7 days per week service, and the standards we set to ensure both the property and its Leaseholders receive an unrivaled, personal experience.

As with all Strangford clients, in the first 30 days of our management we will meet with the Leaseholders to discuss currently unresolved matters, a review of current contracts in place, a strategy to ensure financial health going forwards, and finally a longer-term capital expenditure plan for maintaining a high standard of building condition.

We look forward to discussing our proposal further with you in due course.



What you need to know about us

Here is a quick video for you to watch to find out a little more about who we are and what we are about:

<https://www.youtube.com/watch?v=hH4CiiidMbA>

Strangford's Founder and Managing Director:



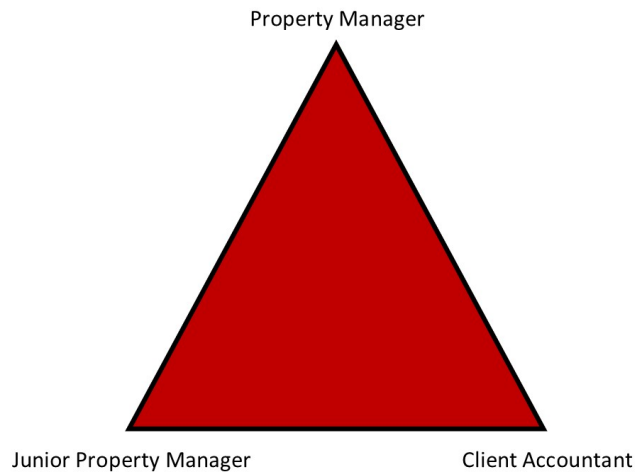
Michael Paul

Michael has managed high-end central London buildings for over 14 years. He is responsible for company growth as well as ensuring clients receive a personal, experienced, and professional management service from the Strangford Management team.

Strangford's Team:

The Strangford Management structure is quite unique in comparison to the industry. We understood client frustrations with a lack of consistent approach from their agent and through discussions with multiple departments. As

such, Strangford Management is set up in 'pods' meaning that each client is provided with a team, dedicated to the management of their site, including a Property Manager as the main point of contact, who is supported by a Junior Property Manager and Client Accountant. These pods are sat together, work together, and provide an unrivaled approach to customer service. You too will benefit from this direct, dedicated approach meaning that you will consistently speak to your pod whatever your query may be, with the knowledge that the pod member is aware of your development and your issue can be resolved swiftly.



Strangford Management is regulated by the Property Ombudsman as well as the ICO and is a full member of the Association of Residential Managing Agents (ARMA). On a personal level, our staff are qualified through the Institute of Residential Property Managers (IRPM) in addition to attending regular training sessions through these professional bodies.



What we do

As a firm of experienced, specialist Managing Agents, we provide you with an efficient, simplified, and proactive approach to the management of your building 24 hours a day, placing customer satisfaction as paramount to our success.

We take pride in the management of our portfolio, ensuring you receive the best value for money in all we do. Our management service includes the following:

Financial

- Administration and collection of service charges, rent, and other monies.
- Organisation for the recovery of arrears.
- Provision of physically separate bank accounts for the development's requirements, including service charge, reserve fund, and where necessary, ground rent.
- Payment of all suppliers up to an agreed amount over and above which we would seek authority.
- Providing information to year-end accountants prior to the preparation of annual service charge accounts.
- Production and circulation of service charge budgets annually prior to year-end and the service charge accounts when audited along with indicator reports.
- Supervision of reserve fund for capital expenditure or the initiation of such fund if not in place already.
- Provision of monthly detailed financial reports including monthly expenditure, arrears, budget analysis, and more.

Day to Day Management

- Ensuring compliance with terms of the lease and statutory requirements.
- Dealing with day-to-day repairs to the structure, fixtures, and fittings.
- Dealing with residents' routine enquiries.
- Ensuring maintenance and service contracts are competitive and sustained.
- Maintaining records of tenancies and all relevant matters with regard to the property.
- Ensuring compliance with all Fire, Asbestos, and Health & Safety

Regulations and recommendations.

- Completing monthly site visits with our unique site inspection app, reporting our findings to your portal.
- Management of on-site staff, including performance, reviews, and optimising procedures.

Insurance

- Arranging all insurance either directly with a reputable insurance company or via an insurance broker, or as specified in any lease.
- Ensuring you fulfill your insurance obligations in accordance with good market practice.
- Preparation of, or bringing to your attention the need to prepare reinstatement valuations.
- Facilitation of all insurance claims.

Company Secretarial (where required)

- Acting as Company Secretary to the Client.
- Issuing membership or share certificates.
- Calling annual general or extraordinary meetings prepare notices, attend, and take minutes.
- Arranging venues for AGM's and EGM's.
- Attending meetings of directors.
- Attending meetings outside of specified hours.
- Filing statutory company returns.

Major Works

- Organising specifications, instructing, and overseeing contracts for major building works. Dealing with Section 20 Consultation, including issuing notices, instructing, liaising with specialist contractors, and handling retentions.

Additional 3rd Party Costs

We are perfectly positioned to arranged additional professional services for you that will be charged separately in accordance with the usual market rates, external consultancy rates, and subject to prior agreement with you. Examples of such services are:

- Fire Risk, Asbestos and Health & Safety Surveys
- Building Surveying
- Structural Engineering matters
- Valuation
- Rating
- Rent Reviews
- Planning
- Legal Advice

- Company Formation

Additional administrative costs are payable by certain parties which are outside the scope of the management agreement as detailed below:

Type of Request	Cost	Responsibility for payment
Receipting Notice of Assignment	£50 + VAT per notice	Individual Leaseholder
Receipting Notice of Transfer	£50 + VAT per notice	Individual Leaseholder
Receipting Notice of Charge	£50 + VAT per notice	Individual Leaseholder
Solicitors Enquires / Sellers Pack	£300 + VAT	Individual Leaseholder
Replacement Lease	£50 + VAT	Individual Leaseholder
Land Registry Documents	£30 + VAT	Individual Leaseholder

Your portal

In addition to our core services, as one of our clients, we set up an online portal for you.

This allows each Leaseholder to access information on their individual property as well as the whole property quickly and easily, at their convenience. All that is necessary is an internet connection and all the information can be accessed through your laptop, tablet, or smartphone. Below are some of the benefits of your portal:

Financial



Strangford Management Ltd

46 New Broad Street
London
EC2M 1JH

0203 651 5870

After Hours: 07852 611 529

office@strangfordmanagement.com

www.strangfordmanagement.com

Financial History

Make A Payment

Unit Details

Emergency Contact Details

Service Charge Account

Service Charge Account

Service Charge Balance £828.29 due

Download Service Charge History(PDF)

Download Service Charge History(CSV)

Date	Description	Debit	Credit	Balance	Document
10 Mar 2021	General Service Charge: Deficit	£16.67		£828.29	
10 Mar 2021	General Service Charge: 25Mar2021 - 23Jun2021	£4.17		£811.62	
20 Aug 2020	General Service Charge: 2nd Half Year Charge 01Jul2020 - 31Dec2020	£500.00		£807.45	

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You will have access to a wide range of up-to-date financial information both for the block and for you individually. These include statements of your account, copies of service charge invoices, budgets, and the block's overall bank balance. You will also be able to see all the banking information required to make payments through the portal.

Repairs and Maintenance



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Overview

Announcements

Secretarial

Documents

Directors Area

Meetings

Units



Z - Demo

Management Company Name
Demo House Ltd

Block Address
Demo House Demo Street London EC2M 13H

Manager
Michael Paul
michael.paul@strangfordmanagement.com
020 3946 2650

Block Email

Number Of Units
50
Apartment Type: 6

Financial Year Start
01 Jan 2021

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You will be able to see a history of all the issues raised in the building, how each issue was completed, and the current status of any ongoing problems. When an issue is completed you will receive email notifications of such so you are aware of exactly how matters are progressing.

Day to Day Information



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Document Type	Document Date	Notes	Download
Insurance Policy	2020-07-01	Building Insurance to 30th June 2021	download
Current Budget	2020-01-01	Current Service Charge Budget for the period 1st Jan 2020 - 31st Dec 2020	download
Current Published Accounts	2019-12-31	Published Service Charge Accounts for the year ending 31st Dec 2019	download
BUILDING INSURANCE	2019-07-01	Building Insurance Policy	download
CLEANING	2019-07-01	Cleaning Contract and Specification	download

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We upload all the latest day-to-day information, for example, which day the refuse is collected, which day the cleaners come, and when the fire alarms are being tested so you are informed as much as you want to be.

Company/Freeholder information



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Governance
Board Of Directors

Company Registration Number
12345678

Annual Return Date
1st June

Company Secretary Name
Strangford Management Ltd

Directors

Name	Appointed
Chairperson 1	01 Jul 2017
Director	01 Jul 2017

Limited By
Guarantee

Incorporation Date
01 Jul 2017

Company Registered Office
C/O Strangford Management Ltd
46 New Broad Street
London
EC2M 1DH

Company Secretary Appointed On
01 Jul 2019

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No matter the management structure of your property, the portal allows tailored information in regards to the company details, any directors that wish to be named, important dates for your calendar such as when the next AGM / Directors meeting is, and who the key points of contact are.

The above information shows only a few features available, each of which ensures the residents are provided the latest documents, information, and updates allowing Strangford Management to communicate with clients using only the most modern methods.

Case Studies

Strangford Management manages a variety of ages, sizes, and types of buildings in Central London from 6 units up to our largest client of 257 units. Please find examples below of two properties, currently under our management, where we have made a significant impact on the overall management experience.



Marlborough, SW3

The History:

Marlborough is a private gated development of 167 residential apartments located in the heart of South Kensington, with an on-site concierge Monday to Saturday each week.

The Problem:

Meeting with the Directors of the development, we were informed that the managing agent in situ had been managing the building for quite some time which had led to extensive apathy in their approach. Delays had been occurring with projects and communication had become so poor that the Chairlady was subject to over 2000 emails per annum from leaseholders. The lack of a strategic approach had also led to avoidable delays in day-to-day management issues causing frustration with the general leaseholders

too.

The Solution:

Having commenced management at the start of 2018, we worked alongside the Directors to prepare a strategy to introduce a collection of procedures to re-educate leaseholders on the process of engagement with the Directors and ourselves, leading to a dramatic improvement in the speed of resolution as well as an overall reduction in the amount of time spent on day to day issues by the Directors.

We also undertook an updated capital expenditure strategy to ensure projects were completed in an agreed and timely fashion.

Furthermore, we worked closely with the concierge on-site to lighten the daily engagement with the Directors, introducing levels of communication that the leaseholders could use, first being the onsite concierge, then Strangford, and only if absolutely necessary, the Directors.

With the help of the Directors, we also reviewed the accounting procedures, providing monthly reports to build confidence in our management, which has led to better budget control overall.

Key Accomplishments:

- Introduction of tailored procedures, immediately improving issue resolution time.
- Introduction of an accurate capital expenditure plan, with the interior and exterior refurbishments being completed having been delayed previously by the previous agents.
- Vastly improved engagement via our leaseholder portal with 130 out of 167 flats actively using the portal.
- Dramatic reduction in the number of calls and emails being sent to the Board of Directors.

We are happy to provide the contact details for the Chairlady of Marlborough for a reference.



Lamb's Passage, EC1

The History:

Lamb's Passage is a mixed residential and commercial development with 80 apartments and 1 large commercial unit on the ground floor. The building has a day concierge Monday to Friday also. Our client is Lamb's Passage Management Company Ltd, a resident-run management company although there is also a third-party Freeholder.

The Problem:

In a similar vein to Marlborough, Lamb's Passage had worked with the same agent for a number of years which seems to have led to an overall sense of apathy. This lack of a proactive approach led to the Directors becoming overly involved in the day-to-day management of the site, causing frustration with both the Directors and the leaseholders alike, overall delays in resolution of the issues but also poor quality of resolutions leading to repetitive visits by contractors.

The building also has a confirmed case with the NHBC in regards to the cladding on the exterior of the building which Strangford is supporting the Directors with.

The Solution:

Upon our commencement, it became clear that contractor management had not been a priority and therefore a full review of the current contracts in place was undertaken, subsequently replacing any failing contracts for better value.

Frustrations had occurred through a lack of financial transparency and therefore the introduction to our monthly financial reports improved the

conversations surrounding finance, making budgeting easier and more accurate.

The building and subsequently the Directors were suffering from the lack of day-to-day procedures in place, with the emphasis on the Directors and concierge to take up that slack. We introduced tailored procedures in order to re-educate leaseholders on how to report issues, what permissions were required, timeframes for resolution, and so on, leading to an improved level of communication and more satisfied leaseholders.

Key Accomplishments:

- Greatly improved financial control and more accurate budgeting.
- Introduction of tailored procedures leading to greater engagement with leaseholders and improved response times.
- 19% budget decrease over two service charge periods.
- The introduction of our leaseholder portal has led to increased engagement with leaseholders and greater transparency.

Please see the below email reference from one of the Directors of Lamb's Passage, Judith Summers:

"To whom it may concern,

I am one of the directors of a leaseholder management company of a block of 80 apartments in London EC1 (60 private flats and 20 social housing). Strangford Residence Management took over the running of our building at the beginning of October 2019.

Nine months on, we can report that we are very pleased to have engaged Strangford. We are confident that our building is being run reliably for the first time in years and, guided by Strangford's finance team, our finances are already in much healthier shape.

Our block manager is extremely knowledgeable in his professional field. He turns up for meetings whenever asked, makes helpful and financially sound suggestions, and, most importantly, gets things done. Even out-of-hours emergencies have been dealt with smoothly and quickly, and essential works have taken place even during the current lockdown. Dean is polite and helpful and easy to talk to, and he responds to emails within the allotted time.

**Judith Summers
Director, Lambs Management Company"**

How we do what we do

We feel that the first 30 days are the most important to making a real impact to the management of your building and therefore, below is a detailed explanation of what we will do and what you will receive:

We review all financial documentation, individual and property wide.

We analyse each contract in place identifying where savings could be made, reporting these to you.

First 7 Days

7—14 days

We arrange a meeting at the property, inviting all owners. We request open honesty about any issues that are currently outstanding and compile these into a time framed list, reporting it to your portal

We arrange for, pending authorisation from you, a surveyor to prepare a CAPEX report on the building so we can prioritise the areas that require attention and when. We also review all compliances reports at this time so we can assess all the information

14 - 21 days

21 - 30 days

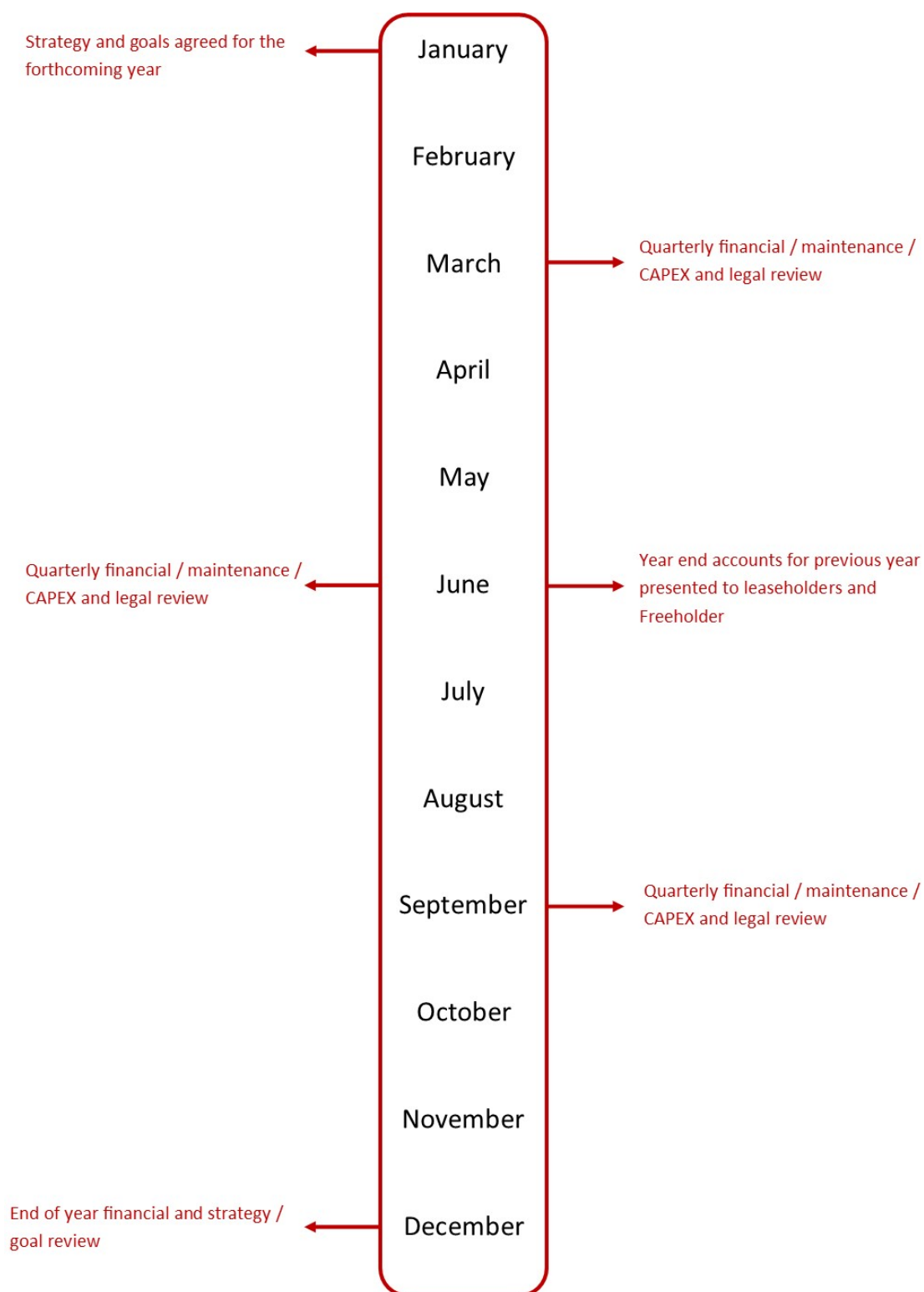
Having gathered all the information on the property, we provide you with a final report detailing and time scaling all works on the property for the current year and future years.

Planning and organisation are at the forefront of our customer service



After the first 30 days of managing your building, we have a clear strategy for the improvement of the property as well as a timeline of goals to achieve throughout the remainder of the year.

In addition to the standard services, below we have detailed what our clients are provided throughout the year and at what times:



The above is the minimum we provide our clients however given the extensive software system, we are able to tailor the reports to our client's requirements.

How much does it cost

We believe that to be the most transparent managing agent we must provide a **singular, all-inclusive management fee** for our entire service, no ad-hoc invoices, no hidden charges giving you peace of mind, and financial transparency.

Our quotation:

Management Fee: £25,200 + VAT per annum

(£8.65 + VAT per unit, per week based on 56 units)

Our management fee includes:

- Full day to day management service
- Complete financial management
- Company secretarial service
- Section 20, major works administration
- Out of hours management service
- Unlimited meetings and site visits
- Hosting and administration of your online building portal

So how does our quote compare with other Managing Agents?

Below is a breakdown so you can see just what is included:		
	Average Managing Agent	Strangford Management
Typical Management Fee		
Financial management	●	●
Day to day management	●	●
Complete insurance management	●	●
Company secretarial duties		●
Major works administration		●
Out of office hours emergency management		●
Hosting of a cloud based portal for all Leaseholders		Free
Unlimited number of meetings for Directors and Residents		●

Where we will make the biggest impact

- **Policies and Procedures:** Following the meeting on-site we are aware that the management of the building is currently lacking basic processes and procedures from the current agent, leading to delays in the resolution of issues. With our experience of similar local buildings, we have tried and tested procedures that we can implement immediately to improve response and resolution times.
- **Financial Reporting:** We shall introduce our unique monthly financial reports for the management company Directors. This report includes the previous months' expenditure, budget to date analysis, arrears reports, and bank balances. This will allow all Directors and Strangford Management to discuss the developments cash flow in more depth, on a regular basis, preventing any issues from being overlooked.
- **Contractor Management:** Upon commencement of our management, a full review of current contracts in place will be undertaken, seeking better value for more. With our fully vetted contractor list, we are able to use contractors who have vast experience working on buildings of a similar type, that are aware of the common issues experienced by residents. All Strangfords' contractors have provided insurance, health and safety information, method statements as well as industry memberships, and previous work examples, all to ensure we are working with the best contractors possible for our clients.
- **Review of Major Works:** We understand that there is a requirement for a full revision of the major expenditure at the development. We shall ensure a review is made, to then update a financial plan for the reserve fund spend going forwards, agreeing on the level of communication of this plan to leaseholders so that everyone is aware of what is planned, and how much it shall cost. This will allow for more accurate budgeting going forwards.
- **Compliance Review:** We are unsure as to whether the development is fully compliant or whether it requires additional surveys to be undertaken and therefore within the first 30 days of our management we shall undertake a full review, recording the results on our specialist compliance software, engaging specialists to complete surveys where necessary to ensure the development is fully compliant and safe. The

findings of these surveys shall be published via our portal to all leaseholders so they may have peace of mind that the development is safe.

- **Monitoring of issues raised:** We understand how frustrating it can be to request works to be completed and for the same issues to be continually outstanding. Our specialist software allows for the accurate tracking of all issues at the development, enabling us to keep an accurate record of all matters to be reported and discussed with the Directors accordingly. This will not only allow the Directors to keep on top of ongoing matters but clearly shows progress being made throughout the year.
- **Monthly site inspections:** We commit to undertake monthly site inspections, recorded on our unique site inspection app that was custom built to include not only an issues tracker but also a health and safety review. This will allow Directors and Strangford Management to confer regularly on any outstanding issues noted during these inspections.
- **Communication and systemisation:** During our on-site meeting we noted that Directors have had no choice but to become overly involved in the day-to-day management of the building, leading to excess amounts of communication between leaseholders and Directors. We shall resolve this by producing a tailored package of procedures and systems to manage the day-to-day engagement with leaseholders, proactively making these available via our portal and via the concierge office. We shall also work with Directors to divert this excess communication from the Directors to Strangford Management, over time reducing the burden on the Board.

Contact details

If you have any further questions we would be happy to answer them for you, please contact:

Michael Paul - Managing Director

Email: michael.paul@strangfordmanagement.com

Telephone: 0203 651 5870

We look forward to welcoming you to our portfolio



strangford
RESIDENCE MANAGEMENT