

Overview

This standard is relevant to any managers who are involved in identifying and putting into place management services to meet the requirements of management agreements and other documents relating to the management of properties.

Lifts, boilers, gas appliances, electrical equipment, fire extinguishers and other equipment have specific regulations and requirements for registration, inspection and insurance which need to be adhered to.

This standard requires that you communicate with all relevant interested parties. These may include:

- owners
- leaseholders
- service providers
- colleagues
- specialists
- builders / developers

Background documentation may include:

- leases / deed of conditions / title conditions
- legislation
- codes of practice

Documentation for service providers may include:

- insurance
- health and safety statements and procedures
- quality procedures
- trade registrations
- references

In Scotland, managers will need to understand:

- The implications of the law including but not restricted to:
 - Title Conditions Act 2003
 - Tenement Act 2004
 - Abolition of Feudal Tenure (Scotland) Act 2000
 - Housing Scotland Act 2006
- The key differences between English and Scottish systems

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Set up management services for property

This standard covers:

- identifying the range and types of service which are required
- setting up block management services

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Performance criteria

Agree management services

- You must be able to:*
- P1 identify the service requirements laid down in management agreements and other relevant documents
 - P2 consult with relevant interested parties to determine the best ways in which service requirements can be met
 - P3 establish a programme of service delivery which clearly states the timing and frequency of specific service provision
 - P4 communicate your service programme to relevant interested parties

Set up block management services

- You must be able to:*
- P5 identify whether the required services are best provided by existing service providers and site staff
 - P6 agree variations to existing contracts with service providers
 - P7 identify where new orders or contracts must be set up to provide services and set these up in line with company procedures
 - P8 check that service providers are competent to provide the services and have the necessary documentation
 - P9 consult with interested parties prior to authorising work
 - P10 provide service providers clear job specifications, and timescales for the provision of services
 - P11 provide site staff with clear instructions and timescales for the provision of services
 - P12 put in place systems to monitor the implementation of management services according to company procedures, management agreements, the requirements of regulatory bodies and other relevant documentation

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Knowledge and understanding

You need to know and understand:

Agree management services

- K1 the principal documentation associated with leases and services, and those required for setting up a management services agreement
- K2 any management agreement which relates to the property in question
- K3 the implications of other documentation relating to the property
- K4 how to interpret management agreements and their terms to determine the services to be provided
- K5 the other information sources which may define the services required
- K6 how to programme service delivery
- K7 the importance of timely handover where you are taking over from another management services provider, and processes for achieving this
- K8 the implications for your work of relevant legislation, regulations, guidelines and codes of practice
- K9 how to take account of the basic principles of building construction and maintenance when identifying and agreeing service requirements

Set up block management services

You need to know and understand:

- K10 the service providers and site staff with whom you are working and the range of work which they can provide
- K11 how to agree variations to existing contracts and set up new contracts
- K12 procedures for placing orders
- K13 how to check the competency of service providers
- K14 how to check that service providers are appropriately insured
- K15 when it is necessary to consult on proposed work – including any statutory requirements for consultation
- K16 good practice with regard to providing job specifications and instructions to service providers
- K17 how to monitor the implementation of management services
- K18 the implications of employment law in relation to site specific staff
- K19 the implications for your work of relevant legislation, regulations, guidelines and codes of practice
- K20 how to take account of the basic principles of building construction and maintenance when setting up management services

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