

ASTRBM19

Support the establishment and running of lessee and owner organisations



Overview

This standard is aimed at all those managers who deal directly with service charge payers / owners setting up organisations to represent themselves in the management of properties.

The term “lessee and owner organisation” in this standard refers to residential management companies, management companies for new developments, commonholders and to residents’ associations where the latter act as representatives of the body of service charge payers / owners in contracting and negotiating with residential block management companies.

In the context of this standard information may be provided through:

- newsletters
- written reports
- meetings

Your role may vary from informal advice as and when appropriate through to taking on a formal role on the committee of an organisation.

Problems may relate to:

- meetings not being quorate
- decisions not having majority support
- decisions not being based upon the lease/deed of conditions etc.

This standard covers:

- the provision of information and advice to interested parties when they are setting up organisations
- the periodic updating of lessee and owner organisations with relevant information on block management
- liaison with lessee and owner organisations to assist them in meeting the legal requirements placed upon them

ASTRBM19

Support the establishment and running of lessee and owner organisations

Performance criteria

Provide information and advice to assist in establishing organisations

- You must be able to:*
- P1 when requested to do so, you provide interested parties with verbal and / or written information on the role and responsibilities of lessee and owner organisations
 - P2 where you cannot provide the requested information, you refer interested parties to other sources of information
 - P3 provide advice to interested parties to assist their decisions on the structure and function of their proposed organisations
 - P4 ensure that the information and advice which you give is accurate
 - P5 assist interested parties in accessing specialist advice

Provide periodic information to lessee and owner organisations

- You must be able to:*
- P6 agree the types of information which you can provide to organisations
 - P7 establish a system for updating management organisations with regard to company and industry information
 - P8 identify relevant information and record it for use in updating organisations
 - P9 produce digests of information for communication to organisations
 - P10 when requested, you provide interested parties with relevant information on the current status of management accounts and work programmes
 - P11 provide information to residents' organisations at agreed times
 - P12 ensure that the information which you give is accurate

Liaise with lessee and owner organisations to assist them in meeting their legal responsibilities

- You must be able to:*
- P13 agree your role with respect to advising residents' organisations with lessee and owner organisations and your own company
 - P14 within your agreed authority and remit, you attend and monitor meetings and other activities
 - P15 where you identify problems, you promptly inform the organisation involved
 - P16 advise organisations on the possible steps they can take to ensure that they meet their responsibilities

ASTRBM19

Support the establishment and running of lessee and owner organisations

Knowledge and understanding

You need to know and understand:

Provide information and advice to assist in establishing organisations

- K1 the circumstances in which it is appropriate and permissible to assist interested parties in establishing organisations
- K2 how to communicate technical information effectively to interested parties
- K3 the sources of information on lessee and owner organisations available to interested parties
- K4 the information on accounts and programmes which you can make available to interested parties
- K5 your responsibilities for providing accurate information
- K6 the sources of specialist advice available
- K7 the implications of relevant legislation, regulations, guidelines and codes of practice
- K8 the duties of a company secretary and their responsibilities, where property organisations undertake this role

Provide periodic information to lessee and owner organisations

You need to know and understand:

- K9 the options for updating organisations which are available to you
- K10 how to assess the relevance of information to organisations
- K11 how to produce usable digests of information without losing essential content
- K12 your responsibilities for providing accurate information
- K13 the implications of relevant legislation, regulations, guidelines and codes of practice
- K14 the duties of a company secretary in providing information

Liaise with lessee and owner organisations to assist them in meeting their legal responsibilities

You need to know and understand:

- K15 the limits of your potential advisory role
- K16 the legal responsibilities of residents' organisations
- K17 how to provide clear and accurate advice to residents' organisations
- K18 the steps which can be taken to resolve problems
- K19 the implications of relevant legislation, regulations, guidelines and codes of practice

ASTRBM19

Support the establishment and running of lessee and owner organisations

Developed by Asset Skills

Version number 2.0

Date approved September 2011

Indicative review date September 2016

Validity Current

Status Original

Originating organisation Asset Skills

Original URN ASTRBM19

Relevant occupations Residential Block Manager; Property Manager

Suite Residential Block Management

Key words Support; lessee; owner; group; property; representatives; service charge payers