



Residential Management Group

And




Alderley Homes

**Property Management Proposal for
The Meadows, Langho**

Dear Janet & Emma,

Thank you for the opportunity to tender for the estate and block management services for the development currently known as The Meadows, Langho.

The following document highlights the assumptions made in the construction of the budget, outlines the individual budget and cost per plot. In addition we have provided the below information for your review:

-  Residential Management Group's (RMG) Company Profile.
-  RMG's infrastructure.
-  Our management approach for the site.
-  RMG's service delivery proposition for both yourselves as the client and the homeowners.
-  RMG's new build approach, support and development.

I hope that I have interpreted your requirements correctly, that the figures are in line with your expectations and the document is of interest to you. Should you wish us to review any areas or amend the assumptions noted, please do not hesitate to contact me.

We are happy to discuss in further detail the services we can offer for this development.

I look forward to hearing from you soon.

Kind regards

Jordan Irving
Business Development Manager
Residential Management Group

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RMG Company Profile

As one of the largest and most respected property management companies in the country, the Residential Management Group portfolio spans over 110,000 households across the United Kingdom, with more than 100 years of successful property management experience.

We are proud to work with the majority of the UK's national and regional house builders and developers, alongside major freehold landlord and agents and to provide your residential management services to both new and established developments.

RMG is a proud member of the Places for People Group (PFP). Places for People is one of the largest property and leisure management, development and regeneration companies in the UK, with over 140,000 homes in their management portfolio and assets in excess of £3 billion.

PFP's main services include:

-  Building and managing homes
-  Providing job and training opportunities
-  Supporting new and existing businesses
-  Offering financial products such as mortgages and loans
-  Providing specialist care and support services that enable people to live independently in their own home.

With the support group structure of companies, together RMG and Places for People are able to offer a complete residential management package to both the public and private sector at any scale.

RMG's Registered Office is located in Hoddesdon, Hertfordshire, however our main property management office is based in Northwich, Cheshire with over 120 employees based at this hub. We also have offices based in Manchester, Newcastle and Leeds serving our Northern properties.

We always take a personal, client-focused approach to residential property management, delivering high-quality customer service including access to our **24 hour, 7 days a week** Customer Service Team.

Our Customer Service Team work together with our team of highly trained specialist Property Managers, Health & Safety Surveyors, Accountants and Back Office support staff who will ensure we deliver you a Property Management service that is comprehensive and second-to-none.

As Managing Agents, we have a unique and important role to play in managing other people's homes and money. Our experience and in-depth knowledge of property management, together with our dedication to professionalism and high standards, is what sets us apart.





We believe in working closely with our clients and residents ensuring all parties the best possible management service and maximum benefit from the range of services we provide, whatever the size of the property, development or portfolio.

RMG Infrastructure and Support

RMG believe it is vital to have a network of professionals and support infrastructure to provide the expertise to support our local Property Management Team. From financial analysts and service charge accountants to legal experts, health and safety professionals and compliance specialists, RMG have a number of departments to ensure our Property Management Team can provide a local on site presence and compliance at all times.

Details of some of RMG's support infrastructure available to customers are detailed below:

Customer Service Centre: RMG prides its customer service on its full 'in house' 24 hour, 7 days a week customer support from our Customer Service Centre. 60 fully trained and monitored property agents, provide support to residents on the full range of management issues. Each of our agents is empowered to instruct contractors to rectify issues that may arise on site. As well as access to our Customer Service Centre via telephone, fax, post or email RMG have introduced a number of online and digital facilities:

-  Residents can access information regarding their account and their development via the RMG Living website and report issues via this online portal. This function can also be used for online payments for service charges.
-  On-line chat facility with one our agents available 24/7 via our website.
-  RMG App for mobile and tablet devices
-  Text alerts and confirmation that repair works by sub-contractors have been completed.

We have ensured that access to our Customer Service Centre is available through a number of methods and portals to strengthen our customer service delivery and accessibility. All communication is logged and receives a unique reference number so therefore can be tracked across the business until its resolution. This allows customers to know at what stage any enquiry is and allows detailed customer service reporting and full visibility on queries detailing volume, response times and issues raised.

Finance Support: Monitor expenditure on the developments and report with the Property Manager on the financial position of the scheme. This will include assistance in the production of the Service Charge Budget and reviewing of the Year End Accounts. Many of our financial analysts hold ACCA, CIMA and AAT Qualifications.

Service Charge Accounting: Producing Year End Service Charge Accounts for each development, liaising with the Property Manager where necessary before accounts are passed for external audit. Within the Service Charge Accounting Team, our Accountants hold

ACCA, CIMA and AAT qualifications and all accounts are prepared within RICS and Tech 3/11 Service Charge Accounting guidelines for Resident Management Companies.

Service Charge Invoicing: Ensure all demands for service charge are sent in accordance with the lease and on time.

Credit Control and Collections: Ensure tight monitoring and control of each stage of the recovery process.

Health & Safety and Compliance: Dedicated in house team to undertake Health & Safety Inspections. They will also provide additional assistance and advice on any compliance issues that may arise. All our Property Management team work with our in house 'Compliance Dashboard' monitoring system to ensure any H&S identified risks are acted upon and all necessary contracts are in place for a development. This can provide assurance for the client that any H&S risk is managed effectively.

Legal and Technical Team: Assistance and advice on any legal, lease or technical issues that may arise and require further investigation and review. Through our legal and technical team, RMG also have the ability to assist developers and clients in the drafting of leases, best company structure, set up and ongoing advice on management.

Solicitors Enquiries Department: Assisting in property sales and transfers, liaising with solicitors and clients and providing documentation such as Deeds of Covenant, Notice to Assign and Deeds of Variation.

RMG's Management Approach

RMG's approach to managing large developments differs from other managing agents as we offer more than just a dedicated property manager for the development. We believe for successful management, having a dedicated team that hold knowledge and experience of the site is more effective than just one key contact for the client and residents.

The team would include Operations Director, Paul Hitchen, who would have overall responsibility for RMG's management of the development. Jack Apperley, Regional Manager together with his associated team, would oversee the operational management. A dedicated and experienced Property Manager, would be appointed to oversee the day to day management, support contractors on site and attend the development officially on a quarterly basis.

RMG believe it is important to engage with residents and would look to establish a Residents Association that RMG would work alongside and support. We would look to hold Resident Association Meetings to report to owners and ensure transparency in our service.

In addition, we would look to hold Resident Surgery events if requested where residents can individually attend and speak to a member of our property management team on a One on One basis. We have found this to be effective across other developments and ensure residents achieve a quick and personalised answer to any queries they may raise.

RMG Service Delivery and Onsite Management

RMG work to a Service Level Agreement (SLA) developed for each of our schemes or clients. Details of our Service Level Agreement proposed for The Meadows can be found later in this document.







RMG understand that as a managing agent, we have to be transparent in our service as well as the cost. The Service Level Agreement is based on 4 main areas:

-  Communication
-  On Site Responsibilities
-  Financial Performance
-  Insurance

RMG will actively report in site inspections, finances and customer service statistics allows transparency of our costs and service.

RMG recognise that reporting to both the client and residents on the development is vital to ensure that we are accountable on our service to both parties. We would propose dual reporting on each of the developments in a number of key areas. The proposed reporting structure for the client and homeowners for each potential development is highlighted below:

Client:

-  Detailed Site Inspection Report carried out by the Property Manager and presented to the Client in a quarterly basis.
-  Site Updates
-  Client meeting to review Service Level Agreement and Financial Performance.
-  Financial reporting on a quarterly basis – Ensuring all finances are being managed appropriately. The financial pack will include: report on arrears, expenditure for the period review, bank balance statement and budget comparison report.
-  Customer Service Reporting – Full visibility of customer reporting detailing both volume, response times and issues raised.
-  Health & Safety and Compliance Reporting- Update on the management of all risks identified on the annual inspection.

Homeowners:

In addition to the reporting for the client, we believe it is fundamental to mirror the service for homeowners to show transparency in our service. Reporting and communication to homeowners and residents would include:









-  Full access, 24/7 to our Customer Contact Centre for any enquires. Should any our homeowners feel their queries have not been resolved, RMG have a full complaints procedure in place.
-  Welcome pack sent to all homeowners when RMG commence management on a new development or a new homeowner moves into a property.
-  Inviting all homeowners to a welcome meeting and establish an active Residents Committee.
-  Meet with the Residents Committee on a half yearly basis
-  Reporting to the Committee on new and ongoing issues, financial reporting (in line with the Data Protection Act) and other development issues.
-  The Property Management Team available to meet individual residents to discuss issues on request.
-  Feedback and communication to homeowners and residents on issues as and when required.

New Build Management Approach

We believe that in securing a new development, the management during the build process, sales and handover must be consistent and fluid to maintain high standards and value.

During the build process and sales, the Business Development Manager: Jordan Irving, will have a hands on role in liaising with site managers, assisting sales staff in queries and providing support for residents when they move in if the development is part built. We would also ensure the involvement of the Regional Manager and Property Manager to ensure that we can develop a detailed knowledge of the site during the build process, and establish relationships with the Client, Residents and other stakeholders.

Our new build strategy would focus on the below key areas:

-  Continuous engagement with the developer
-  Support, assistance and training to on site sales staff
-  Production of Sales Leaflets to assist sales staff and potential purchasers
-  Continuous site visits and engagement with site staff
-  Financial management to reduce or eliminate potential void payments
-  Assistance in lease drafting/ reviewing
-  Management support in site set up
-  Health & Safety and Fire Risk Assessment support and guidance

RMG would set up a dedicated team to implement the above strategy and ensure the site is successfully integrated into the business. Together with the extensive support infrastructure RMG are able to offer, the key members of the team are:











-  Jordan Irving, Business Development Manager
-  Justin Herbert, Managing Director
-  Melissa Lloyd, Head of Property
-  Jack Apperley, Regional Manager
-  TBC, Property Manager
-  Paul Hitchen, Operations Director
-  Antony Gore, Head of New Business
-  Chelsea Ollier, Head of Finance Support
-  Chris Alexander, Legal and Compliance Director
-  Alan Inglis, Finance Director, RMG

As detailed above, RMG believe assisting sales staff at the development is vital and we therefore produce tailored sales leaflets for each new build development. We find these to be a useful tool for sales staff and potential purchasers understand what a service charge is, why they are charged it and the proposed service charge costs. Members of our dedicated team, primarily the Business Development Manager and Property Manager will also be on hand to assist sales staff in any additional sales queries they may have and to provide additional support and assistance.

Budget Introduction and Key Assumptions

To ensure the budget proposal matches your requirements for the scheme, we have outlined below some key considerations we have made when constructing the tender and have noted some assumptions. If you have any comments or amendments to these points, please do not hesitate to contact us.

Notes & Assumptions

-  The legal framework for the scheme is based on the houses being sold freehold with a Residents Management Company being party to the legal transfer (TP1) .
-  RMC to be incorporated by Alderley Homes.
-  RMG (via subsidiary company) to act as company secretary for the Management Company. Our fee for this is included in our proposal.
-  Alderley to act as Directors of the Management Company until handover to resident Directors.
-  Each unit will contribute towards an Estate Charge of which RMG will collect on behalf on the Management Company.
-  Estate charge costs shared across the scheme based on an equal split per unit (8 units total).
-  Based upon the following plans;
 - 4986 Northcote Road, Langho - Preliminary Issue for Comment
 - 4986.04D Northcote Road - Landscape Plan
 - 24075_Master Deed Plan-Layout
 - 4986 Northcote Road Landscape Management Plan Rev A (1)
-  The following assets are included;
 - Private surface water pumping station (specification TBC) linked to hydrobrake system
 - 4no private street lighting columns (LED)
 - Automated vehicle gate (specification TBC)
 - Manual pedestrian gate with electronic locking (specification TBC)
 - 3 phase electrical supply feeder pillar
-  Grounds maintenance is based upon a 12 visit per annum schedule ensuring routine maintenance of the shrub beds and all litter picking / sweeping of the site. Please note that this is not in accordance with the landscape management plan which specifies more regular attendance (fortnightly and 3x per weeks) which we would consider excessive.
-  Provisions for asset maintenance are based upon standard servicing requirements for typical assets of this type. Quotations may be obtained for any specific maintenance requirements detailed by the manufacturer / M&E consultant.

Pending any additional information, requirements of the development and requirements of yourselves we are able to review and amend any notes and assumptions made above, to fall in line with your expectations.

Proposed Budget

As per the below draft service charge budget, each property on the development will be liable to contribute per annum in estate service charges.

A copy of this budget will also be sent independently for ease of reference.

Northcote Road, Langho



V001

Budget for period 01.01.2025
Date of this issue Feb-25

to 31.12.2025
Prepared by JI

Type of Unit
No. of Units of Type
% per Unit
Cost per unit

Estate Charge (All Units)
8

Total Cost [Redacted]

Contract Maintenance	[Redacted]
Grounds Maintenance - Monthly Visits	[Redacted]
Gate Maintenance	[Redacted]
Pumping Station	[Redacted]
Insurance	[Redacted]
Public Liability Insurance	[Redacted]
Engineering Insurance	[Redacted]
Administrative	[Redacted]
Management Fees	[Redacted]
Audit & Accountancy	[Redacted]
Company Secretaries	[Redacted]
Health & Safety Inspection	[Redacted]
Postage / Sundries	[Redacted]
Repairs	[Redacted]
General Repairs & Maintenance	[Redacted]
Electrical Repairs	[Redacted]
Utilities	[Redacted]
Electricity	[Redacted]
Reserves	[Redacted]
General Reserve Fund	[Redacted]

*Please notes this is a draft service charge budget and may be subject to change.

Detail of Services

The below information gives further detail of the items that are included within Service Charge for The Meadows.

Contract Maintenance

Grounds Maintenance: An allowance for the provision of a maintenance contract to provide grounds maintenance to the communal grounds on a 12 visit per annum basis. A detailed specification can be provided upon request.

Gate Maintenance: An allowance for the provision of a maintenance contract to provide routine gate maintenance visits including annual gate force test.

Pumping Station: An estimated allowance for the provision of a maintenance contract to the private pumping station to include telemonitoring service.

Insurance

Public Liability Insurance: An allowance to cover the cost of Public Liability insurance for the communal estate areas to safeguard the managed areas. This includes an allowance for material damage cover to be included for gates, lighting etc.

Engineering insurance: An allowance to cover the cost of Engineering insurance for the automated vehicle gates.

Administrative

Management Fee: A fee for the provision of services provided by RMG in accordance with the Management Agreement and Service Level Agreement.

Company Secretary: A fee for the provision of services provided by Hertford Company Secretaries (an RMG Group company).

Audit & Accountancy: Covers the cost of RMG's services in relation to the preparation of accounts and an external independent audit.

Health & Safety Inspection: An allowance for the Bi-Annual Health & Safety Risk Assessment to ensure the safety of the residents of The Meadows.

Sundries: An allowance for the cost of postage to allow for communications to be sent out to residents including newsletters and general letters. Also to cover the cost of any venue hire costs when residents meetings take place.

General Repairs & Maintenance

General Repairs and Maintenance: An allowance for any minor repairs which may be required to the communal areas from time to time. This would include ad-hoc repairs to the gates and winter maintenance requirements e.g. grit provision.

Electrical Repairs: An allowance for any minor electrical repairs which may be required to the lighting from time to time.

Utilities













Electricity: An allowance for the landlords electricity supply for the gates, pumping station and lighting.









Reserves

Reserve Fund: A sum to be set aside for any unexpected, unbudgeted items of major expenditure.

Management – Service Level Agreement

RMG believe that it is fundamental that the service that we provide is measurable, fits the developments specific needs and can be monitored. RMG have created a Service Level Agreement to ensure that this is the case and to ensure that the level of service is clear from the on set. The proposed SLA for The Meadows is outlined below:

Service Area	Frequency
1 - Communication	
<ul style="list-style-type: none">  All customer emails and letters acknowledged within 24 hours, responded to within 5 days.  Fully trained and monitored property teams answering all property related calls. All calls are tracked and receive unique reference number. Target for 80% of all property maintenance enquiries to be resolved within 24 hours. Customer Contact Centre agents empowered to instruct contractors.  Property Manager available to meet individual residents / Client to discuss issues on request.  Client meeting to review Service Level Agreement and Financial Performance.  Annual Residential Meetings held, organised by RMG. Available to residents & local authorities  Resident Surgeries arranged to allow for one-to-one appointments as an alternate for a residents meeting.  Establish and maintain Resident Committee. 	<p>Continuous</p> <p>Continuous</p> <p>On request</p> <p>4 Per Annum</p> <p>Annual</p> <p>As required</p> <p>Continuous</p>
2 – On Site Responsibilities	
<ul style="list-style-type: none">  Detailed Site Inspection Report carried out by Property Manager and presented to the Client.  Appointment and monitoring of contractors, re-tendering on instruction of the Client.  Health & Safety Inspection Report – all issues identified and actioned by the Property Manager.  Reactive repairs – instruction within 24 hours providing funds are available.  Facilities Management – ensuring maintenance contracts in place, for all on site soft services. 	<p>4 Per Annum</p> <p>Annually</p> <p>Bi-Annually or as required</p> <p>Continuous</p> <p>Continuous</p>
3 – Financial Performance	

 Invoicing of Service Charges – providing budget and explanations notes upon issuance.	Annual
 Management of Arrears – tight monitoring and control of each stage of the recovery process.	Continuous
 Budget – produced a month in advance of period end and approved in a meeting with Client.	Annual
 Accounts – produce and review with Client.	Annually
 Payment of Contractors – within 30 days on receipt of invoice.	Continuous
 Financial Pack for Client – Ensuring all finances are being managed appropriately. This pack will include: report on arrears, expenditure for the period review, bank balance statement and budget comparison report.	Quarterly
 Reserve Fund Management – ensure account is ‘ring-fenced’ and appropriate amounts are accrued each year to meet the demands of the lease.	Continuous
4 – Insurance	
 Claims – ensure all claims are actioned within 24 hours of receipt/ escalated where appropriate.	Continuous

Contact RMG – The Meadows Management Team

To ensure that communication between Persimmon Homes and RMG remains open and trouble free, we are pleased to provide the key contacts relating to The Meadows. This information can be freely communicated across your organisation.

Business Development Manager:

Property Manager:

Regional Manager:

Head of Property:

Head of New Business:

Regional Operations Director:

Managing Director: