



EVOLVE
BLOCK MANAGEMENT

2023 Company Brochure

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Evolve Block & Estate Management Ltd is an appointed representative of Arthur J. Gallagher Insurance Brokers Limited which is authorised and regulated by the Financial Conduct Authority. Registered Office: Spectrum Building 55 Blythwood Street, Glasgow G2 7AT. Registered in Scotland. Company Number: SC108909

Evolve Block & Estate Management Ltd. Registered Office: 12 Millstream, Christchurch Rd, Ringwood, BH24 3SE, VAT No. GB293981353 - Company No. 10689785

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SECTION 1

Who are Evolve?





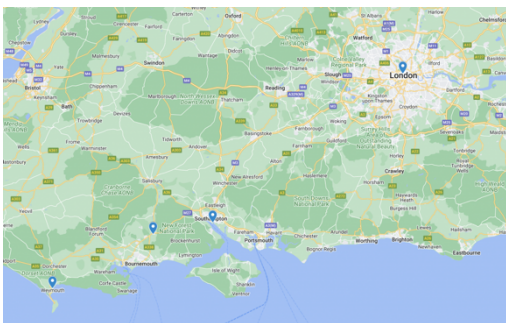
Evolve Block & Estate Management Ltd was established in 2016 to fill a growing hole in the market left by managing agents who had lost their customer focus and client's trust. The organisation has started to re-write the rules on customer engagement putting the owners at the heart of everything we do. Our industry has evolved dramatically over the last 7 years, and we have too, from fire safety to new regulations and reform.

"Communication and Trust are the two main ingredients for successful relationships"

The mission statement for the business is: **"From Developers, Freeholders, Resident Management Companies (RMC), Right to Manage Companies (RTM), let us take the stress, administration, legal & accountancy management from you into safe and trusted hands"**.

We believe that you cannot be complacent in property management. We are constantly looking to better our service by efficient use of the latest technology, keeping up to date with the current technical updates and law, adhering to the latest industry codes of conduct and practice and engaging with our stakeholders to ensure what we do benefits our clients directly.

Locations



From our head office in Ringwood, we can easily and quickly cover London, Dorset, Hampshire and Wiltshire. We manage blocks and estates throughout these four regions. We have good relationships with many contractors in these regions meaning we can offer real value for money to all our leaseholders & owners. The business has four offices, Ringwood, Southampton, Weymouth & London.

Services

Evolve offers residential leasehold management services, build-to-rent services, estate management services & commercial leasehold management with rent collection. Evolve can undertake most property related services and offer a finance-only management service, similar to the rent-receipt of the letting's world, to enable those sites with more hands-on residents and directors to be involved with our support to help them save on costs.



To put ourselves apart from our competition, we work on a paperless system where most documents are scanned and held electronically, meaning they can be retrieved quickly and shared effortlessly, to speed up our response times. Our clients also have a 24/7 log in to their own online web portal to be able to access these documents as well as general accounting information such as bank balances, supplier invoices and leaseholder balances.

Having strong experience in lease interpretation, major works administration, insurance negotiations, service charge collection and accounting, we can provide a service to fit any requirements whilst keeping costs as low as possible.

Training & Memberships

The whole team attend training courses periodically; on average every couple of months, on a variety of topics with ARMA, IRPM and RICS. We also receive regular technical updates from our professional bodies, solicitor's newsletters, and professional trade magazines. We undertake regular in-house training and quality control exercises and have regular personal development meetings to ensure our staff are achieving their full potential and providing the best customer service.



Leasehold Management Professionals

Our Managing Director is one of the founders, chair and host of a regional leasehold management training organisation. The LMP is a not-for-profit organisation and there are regular events throughout the year at very little cost to block managers and managing agents.

With speakers such as the head of the IRPM, the Law Commissioner & The Property Ombudsman as well as barristers and other professionals and as a result of Benjamin's work, Evolve has many professional industry connections from which to help our clients.



To find out more, visit www.the-lmp.org.uk



How we deal with the end-user is important and building trust & relationships is the key to the success of any building. We insist on the 'golden-thread' of information flow, enabling us to control the seamless information flow outwards to the residents and owners, avoiding situations where people do not know what is happening on their estate.

The people-management is approximately 80% of our job in managing our estates and having residents and owners on our site by providing timely updates and proactive information fosters good working relationships. As a people-based business we understand people & their psychology, we know what makes people tick and how to keep residents and owners engaged.

Apart from the technical aspects of managing a block of flats, we are a friendly organisation that prides itself on being open and honest and we prioritise customer care & safety. Managing the expectations of our clients is important as without trust and transparency, the working relationship becomes untenable as is the current situation with Warwick Estates.

People buy from people, so our organisation is designed to be a friendly and open business but keeping tight reins on the technical aspects of the management. This provides reassurance to you as the client that performance is being maintained and that this is being communicated effectively to you.

SECTION 2

Our Team



Our Senior Management Team



Our **CEO, Benjamin Hume** *Ba(Hons) MARLA MIRPM AssocRICS CertCIH*, is a multi-award winning fully qualified lettings property manager with the Association of Residential Letting Agents, a fully trained and qualified member of the Institute of Residential Property Management, an elected associate surveyor with the Royal Institute of Chartered Surveyors and a Certified Practitioner with the Chartered Institute of Housing. Unlike a lot of our competitors this means the business owner is the technical lead and not left to senior property managers, allowing for a comprehensive and knowledgeable top-down approach, ensuring the decisions we make in the business are the right ones to protect and benefit our clients in this ever-changing industry. In his spare time Benjamin enjoys kayaking, motorcycling and landscape gardening (which is an advantage when tendering for grounds maintenance contracts at our sites!)

Our **Chief Operations Officer** is *Helen Macrae MIRPM AssocRICS*, is an award-winning, fully trained and qualified member of the Institute of Residential Property Management & an elected associate surveyor with the Royal Institute of Chartered Surveyors. Helen has also acquired her NEBOSH Health and Safety General Certificate. With over 21 years experience in the industry this puts her in good stead to oversee the operations of all the departments. Helen also acts as our compliance and technical manager who looks after the fire safety, health & safety assessments such as lift reports, asbestos, etc. and makes sure your homes and investments are safe and secure. Helen also heads up our major works department and works with our teams of surveyors to ensure major works projects are managed correctly, to budget and the residents are happy. Helen won the prestigious Property Manager of The Year award in 2022. She also sits as the sole leasehold management representative on the Property Redress Scheme panel of experts.



Our **Senior Service Charge Accountant** is *Helen Needham MAAT*, Helen has worked as a company accountant and service charge accountant for many years and worked specifically in the residential lettings and residential service charge accounts sectors. Helen has helped to shape our accountancy practices within Evolve and has worked closely with Qube, our software provider to introduce and test new advances in service charge financial management. Service charge accounting can be complex to understand but Helen is more than happy to help!

HELLO!



MEET THE TEAM



Senior Property Manager, Sarah Belsham *MIRPM AssocRICS* joined us in 2022 as an award-winning team superstar to help manage a growing property portfolio in London to ensure we provide the best service to our clients as we can. Sarah has worked in the property management industry for 20+ years and is an award-winning respected property manager with a loyal following of clients and experienced people manager. In her spare time, she enjoys films, books (Tudor history!) and being with her family.

Senior Property Manager, Kirsty Marshall *MIRPM* joined us to help manage our Hampshire & Wiltshire portfolio consisting of a number of large estates and tower blocks. Kirsty has worked in the industry for 15 years and is a great people manager and is well respected by her clients for communication and maintenance management. In her spare time, she is an avid music lover and often goes to live concerts, spending time with her two children. In 2022 and 2023 Kirsty has been shortlisted for Property Manager of The Year at our national property management awards.



Property Manager & Compliance Coordinator, James Bond, joined us in 2023 following a period of growth and the need for new superstar property managers in our team to look after a growing client base. James has substantial experience onboarding new clients, from brand new developments to tricky handovers from outgoing agents so will be overseeing the process of new clients joining us. James will be managing sites in Dorset and Wiltshire and is based out of our Ringwood & Weymouth offices.



Junior Property Manager, Chantelle Monks joined us to support our growing portfolio in West Hampshire and East Dorset and to assist the sales and transfers team. With previous experience in residential lettings Chantelle is able to understand customer needs and help with the smooth running of our office. In her spare time, she enjoys paddle boarding and long walks in the New Forest.



Service Charge Accountant, Rachel Jessop, Rachel joined us in 2023 and has been working in service charge accounts for 4 years now, starting as a purchase ledger, then sales ledger and working her way up to service charge accountant. This has given her a great advantage for understanding tenant and supplier needs. It also means she can sympathise and advise through each stage of the service charge accounting process. In her spare time, she enjoys reading light hearted crime books, trying new crafts and cooking a mean meal. Rachel studied archaeological and forensic sciences at university so not only would she have a keen eye on a crime scene but has a keen eye for your accounts also!

Service Charge Administrator, Sam Needham MAAT, Sam has joined us to run our Purchase Ledger and Sales Ledger processes. These are arguably some of the most important processes, ensuring the bank balances match our systems, contractors get paid on time, and many more vital tasks, and we provide the reporting required for our continued membership of RICS and ARMA.

Central Services Coordinator, Chloe Couzens, Chloe heads up our pre and post sales department as well as a number of other technical departments within the organisation. This is to allow our property managers to focus on their contact with clients, with a dedicated support network.

Compliance Coordinator, Byron Cooper, Byron provides much needed support to the team in receiving and processing the many health & safety and fire safety reports and assessments we receive every day. These reports and their recommendations are processed and the tasks given to the property managers to complete, with an oversight by Byron and Helen Macrae. In his spare time Byron takes part in professional sim racing leagues and is an avid traveller and trekker.

SECTION 3

Accreditations & Awards



Our Company Accreditations:



A member of the Association of Residential Managing Agents. (ARMA) – ARMA is our trade body and is responsible for setting quality standards that managing agents should adhere to, it is voluntary to join but most agents who strive for the best standards, subscribe to their standards of customer care.



A regulated member of Royal Institute of Chartered Surveyors. (RICS) - RICS are the most widely respected property and construction regulatory organisation in the UK and are responsible for the important Service Charge Code, which directs member agents how to look after your funds.



An affiliate of the Institute of Residential Property Managers. (IRPM)
The IRPM is the UK's qualifications body to provide training and examinations for property managers to prove competency.



A member of the Property Redress Scheme. (PRS) – Our redress scheme provider, to help with our service disputes if we are unable to resolve in-house



A subscriber to the Information Commissioner's Office (ICO) – The ICO is responsible for upholding the UK's data protection legislation, the GDPR, and will hold members to account for data breaches and provide advice and support to members in case of hacking, breaches or other training as required.



A regulated member of PropertyMark – PropertyMark is an industry body and training organisation aimed at the whole property industry, mainly sales and lettings but provides support to property management agents by virtue of the close relationship. We have selected to regulated members here as they provide valuable training and support on all areas of property law not just block management.



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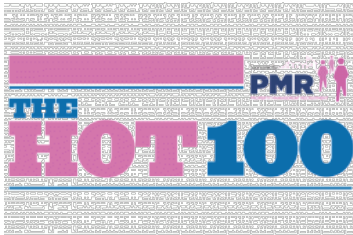
Company Awards



In **2017** our MD was Highly Commended in the News on The Block Property Management Awards (PMAs). Following a long commitment to the industry and leaseholders.



In **2017** our senior property manager Sarah Belsham was awarded the Regional Property Manager of The Year. Recognising her industry achievements.



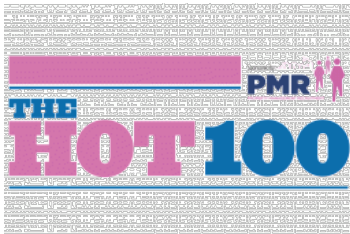
In **2017** our MD was featured in the 'News on The Block' magazine Top 100 leasehold industry professionals in the country. This is a list of block management professionals, taken from the entire industry throughout the country, which is a huge achievement and recognition of our strive to be the best.



In **2018** our MD was awarded '**Regional Property Manager of The Year**' at the 2018 News on The Block Property Management Awards, which cements me as one of the top performers in our industry nationally.



In **2018** our MD was also a finalist in the Royal Institute of Chartered Surveyors 'Young Surveyor of The Year' award in 2018. This is a great achievement following the hard work ensuring the best standards of service as well as involvement in regional & national industry events.



In **2018** our MD was again featured in the 'News on The Block' magazine Top 100 leasehold industry professionals in the country. This is a list of block management professionals, taken from the entire industry throughout the country, which is a huge achievement and recognition of our strive to be the best.



In **2019** Our staff have been recognised again in the 2019 property management awards, being shortlisted for two prestigious awards, the 'Customer Services' award and the 'Best Managing Agent of an RMC/RTM Block' award.



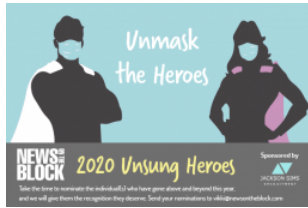
In **2019** our MD had once again been shortlisted for the 2019 'RICS Young Surveyor of The Year' award.



In **2020** our MD won an award in the Property50 awards, recognising the top contributors to our entire sector. I was awarded the trophy in the property manager category.



In **2020** for the final time, our MD had been shortlisted for the 2020 'RICS Young Surveyor of The Year' award, before the age limit was reached.



In **2020** our accounts manager Rachel won one of the 'Unsung Hero' awards with the News on The Block Magazine for all her work during the Covid Pandemic.



In **2021** our MD once again won an award in the Property50 awards, recognising the top contributors to our entire sector. In 2021 I was awarded the trophy in the industry influencers category.



In **2021** Our business was shortlisted for 'Property Management Company of The Year' in the 2021 Property Management Awards, following a large influx of new clients, amazing feedback and high level of client retention.



In **2022** our MD once again won an award in the Property50 awards, recognising the top contributors to our entire sector. In 2022 he was awarded the trophy in the property managers category.

Unsung Heroes 2022



In **2022** Helen Macrae was recognised in the Unsung Heroes awards for her tireless contribution towards Evolve and the wider industry.



In **2022** our company was awarded **FOUR** awards at the 2022 Property Management Awards. Helen Macrae won 'Property Manager of The Year' The company won 'Property Management Company of The Year', our MD won 'Influencer of The Year' and one of our concierge colleagues won highly commended in 'Concierge of The Year'.



In **2023** our company has been shortlisted for 2 awards in the 2023 Property Management Awards. **Regional Property Manager of The Year (Kirsty Marshall)** and **Scale-Up Property Management Company Of The Year**.

SECTION 4

Service Charges & Budgets



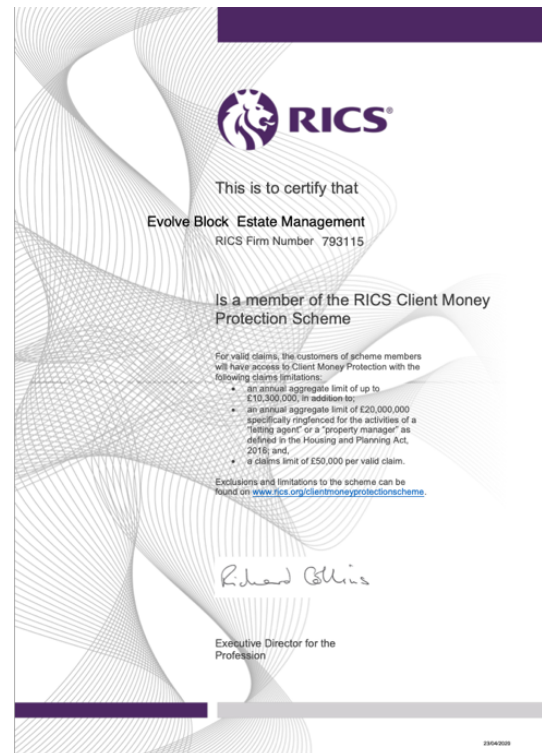
Service Charge Funds



Service charge funds are held in designated S.42 client trust accounts with Barclays and NatWest. Reserve funds are also held separately where appropriate. Designated reserve accounts where appropriate, and each reserve expense type is notionally separated by our software and accountancy package.

Did you know that as we are full regulated members of the Royal Institute of Chartered Surveyors, we have full client money protection cover for all of our clients? We are one of just a very small, privileged minority of agents in the south to be admitted as members of the RICS and be able to offer full client money protection cover. Join us today to make sure you are protected and not with another agent that does not have any cover.

All of our bank accounts are reconciled regularly in accordance with best practice. Transactions are fed directly into our management software from the bank electronically, so we can ensure prompt and regular inputting to prevent arrears or other problems arising from delays or awaiting traditional paper bank statements.



Our software package **'Qube'** produces various financial reports for directors which include a snapshot of expenditure on each expense type against budget at any time. Meetings or phone conferences can be held to discuss expenditure and budgets at a frequency agreed with the client when management commences. Directors and freeholders also have their own dedicated access into our online software package **'Dwellant'** so that they can check supplier invoices 24/7 without us needing to provide reports. This is the ultimate in transparency which we are proud of.

Budgets & Keeping Costs Low

Upon instruction, we would meet with the Directors/Freeholder and carry out a site visit to discuss the current service charge budget and financial situation, as well as any current disputes or plans. We would advise reviewing your lease to make sure what we will inherit is correct and the leaseholders/owners are paying the correct amount towards the correct expenditure.

We invest a lot of time in the preparation of our budgets and achieving the best value for clients. Some substantial cost savings have recently been achieved for clients on insurance renewals and day to day maintenance contracts. Our goal is to keep service charges as low as possible whilst maintaining the covenanted services under the lease, this keeps leaseholders and the client happy!



To ensure we provide the transparency to our clients and customers, we often host interested leaseholders in our office or on Zoom meetings to explain accounts and other information to ensure they are better informed.

Arrears and Credit Control

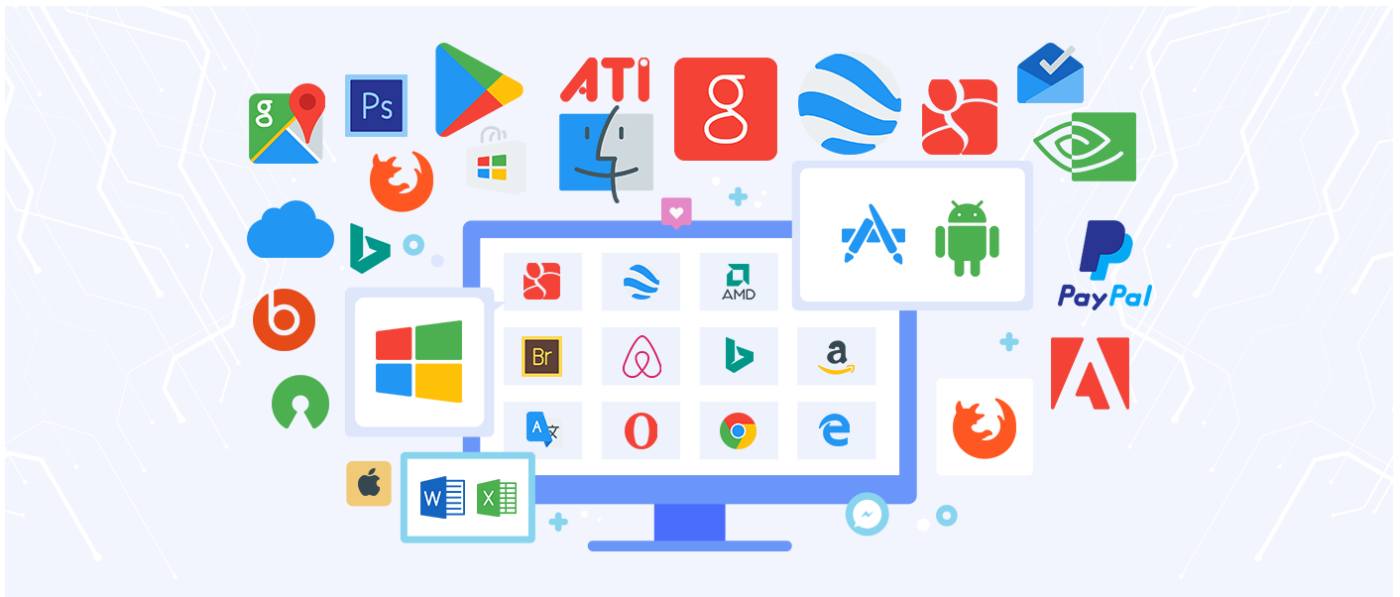
We work closely with the directors and freeholders with an agreed timescale for arrears that is within the lease requirements. Whilst advocating strict monitoring of arrears, we also advocate communication with the leaseholders to ascertain genuine reasons for non-payment before taking any formal approach. This would include telephone calls and emails. Late payment charges would be employed to prevent further arrears.



We have a robust debt recovery policy in-house which our staff follow. From the initial contact through to referral to debt recovery agents, we work proactively to recover costs as quickly and efficiently as possible. Our external debt recovery agents work on a No-Win-No-Fee basis and any costs incurred are charged to the debtor, so it should not cost the client or service charge.

SECTION 5

Software & Processes



Software Systems

The systems we have implemented provide a clear, easy-to-use customer and client portal, which works on both desktop and mobile devices to ensure maximum engagement. This software provides a direct feed from maintenance requests to the visible portal so that residents, owners and the client can review what has been reported and its subsequent progress.

The software allows for you as directors to log in and review/access any information about your estate and run reporting should that be required. We would provide full training to the directors on how to access your account and retrieve information.

The software we have identified is industry leading systems used by national agencies, providing a robust customer friendly engaging platform, thoroughly tested and used processes & a high functioning accounts engine to provide exceptional reporting and accountant at the click of a button. We currently use:

- **Dwellant** - for the customer experience platform, concierge management, maintenance reporting & supplier invoice management, used by some of the biggest agents in the country. Our community & owner portal can be found here www.evolveportal.co.uk



- **Qube** – for the financial engine, which is a dedicated service charge management software used by the largest agencies the UK managing thousands of flats in their portfolios.



- **Compliance** – We run a specialize compliance platform, enabling constant management of all matters relating to health & safety.

- **InformDirect** – for the management of company administration, allowing us to change officers, prompt submissions to Companies House and change members & shareholders upon sales of properties without delay.



- **DropBox** – for our secure encrypted cloud storage server. We can store, archive and securely share files and folders with surveyors, accountants and suppliers to ensure quick and easy transfer of information.



- **AdobeSign** – for our secure e-signature system. This allows us to obtain signatures quickly and securely on agreements, accounts, licences and contracts.



All of these software systems work directly together and provide their information to the main Dwellant platform, enabling a single access point for us and the client to access any information and tiered access for residents, concierge & owners to access information suitable for their role/position in the estate.

Processes

The processes we would look to automate and bring together into one environment would be:

- Maintenance reporting & progress to provide reassurance of the state of any ongoing maintenance issues, avoiding the need for manual updates and calls.
- Messaging boards for residents to interact with, giving them visibility on issues and updates around the estate.
- Alert function so the agent or directors can provide immediate updates to everyone on any estate facility interruption. This will ensure we control the information dissemination proactively.
- Compliance platform to enable all safety risks are monitored & a compliance score maintained at each site. This platform schedules all of the safety checks, tests and assessments automatically to provide a complete audit of safety requirements meaning should any authority require site of testing and assessment regimes, they can be provided instantly.

Each site requires its own tailored processes, and we have sites with commercial units forming part of the estate, dedicated holiday let sections as well as sites with concierge services & on-site caretakers, so we have experience dealing with varied and unique estates requiring unique services.

We can provide samples of any financial reports from Qube if you would like to see the content of these, as well as demos of any of our systems, along with process and procedure documents for you to review.

SECTION 6

People & Communication



People & Communication

One of the biggest concerns everyone has is access to property managers and staff at the managing agents. This causes the biggest frustration and is one of the top 3 reasons for agents to be given the sack.

Property Manager



As part of the onboarding process, we appoint a named property manager for your estate. They would ensure maintenance matters; contractors & wider estate matters are to be attended to promptly. This person would become the subject matter expert for all things at your estate and would attend meetings, create your service charge budget and be the key decision maker on management matters, so there is always continuity instead of a team of property managers all attempting to resolve the same issue.

Your property manager would be responsible for:

- Arranging and attending regular site visits.
- Attending the client meetings.
- Arranging or attending the AGM as required.
- Budget and cash flow management and awareness.
- Managing the health & safety compliance for the estate.
- Providing key technical and procedural guidance.
- Working with our wider team to ensure the key provisions in customer care, client care & communication as outlined in this report are provided.

Service Charge Accountant



You would also have a named client account manager, who would be the point of contact for directors and owners to discuss any and all financial matters concerning the running of the estate. As per the property manager role, they would be the financial subject matter expert for the estate.

Your accounts manager would be responsible for:

- Creating and sending the service charge demands.
- Arrears recovery processes.
- Preparing the year-end accountancy bundle.
- Ensuring suppliers are paid promptly.
- Attending the AGM if required.
- Attending client meetings if required.
- Producing the regular financial reports.
- Ensuring the client accounts are reconciled frequently.

Compliance Manager



As our industry is a complex beast with many facets of health & safety as well as legal and statutory requirements place on the client and ourselves. We make sure each client is introduced and works closely with a compliance manager, who oversees all matters health & safety, fire safety, legal compliance and lease compliance.

Your compliance manager would be responsible for:

- Periodic health & safety reports.
- Fire Risk Assessments & resulting actions.
- Asbestos & Legionella risk management.
- Compliance platform management and task adherence.
- Ensuring external suppliers are qualified.
- Ensuring fire safety equipment is under contract and managed.
- Teaching and educating the team on the latest and prevailing technical information.
- Ensuring the leases and TP1 documents are adhered to.

Communication & SLA

As a professional services organisation, we adhere to a strict customer standard of communication. As a result of this, we created an SLA document (Service Level Agreement) which dictates what you should expect from us and what we can expect from you. This has been based on extensive research to ensure that all parties expectations are managed in a sustainable way, so that the priority of requests is managed.

We are happy to provide a copy of this document and we will ensure all owners, directors, freeholders and residents know how to reach us.



As part of the ongoing management processes, we would commit to the following:

- Financial reports provided to the client at an agreed frequency.
- Directors & leaseholders provided with ongoing access to the portals 24/7.
- Regular site visits & reporting outcomes provided.
- Director meetings (Virtual if requested) at an agreed frequency.
- Management and reporting of the property manager's progress & competency.
- Named colleagues as explained in the section earlier.
- Regular reviews of estate contracts to ensure value for money and report any concerns to the directors.
- Respond to routine works order requests within 48 hours & urgent or emergency works within 24 hours.
- Provide proactive communication levels to the highest standard as per our SLA document.
- Annual accountancy will be arranged, received and concluded within 6 months of the year-end.

The ongoing management of the service will be fluid and we adapt our approach to fit the needs of the site as we progress. If there is a need to substantially deviate from the usual management, we will ensure regular communication is held and reviews accordingly.

It is important that both the agent and client foster a positive working relationship with the management of the estate and both parties are able to offer constructive and engaging input into the estate, especially in the first 12-24 months.

Communication & trust are our two most important company mantras.

SECTION 7

Handovers



The Handover Programme

The handover process is the most crucial part of the relationship, it is where we obtain the technical, financial and legal paperwork, information, knowledge and issues from your previous agent. This is where we spend the time to ensure it is onboarded.

We have a robust onboarding process and policy; however we have provided a simple programme timeline so you can understand the key stages of the process.

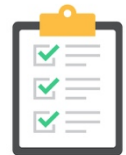
Stage 1 – Client Signs the Contract



At this point we would agree the handover date based on the current agent's acceptance of notice and a contract would be drawn up based on that date and fees agreed in this proposal.

Stage 2 – Pre-Handover Administration

We would provide our handover checklist to the outgoing agent to explain what we require and request the current leaseholder list of names and contact details, the current budget & schedules/%'s each unit pays so we can load everything onto our systems. Bank accounts would also be opened at this stage.



Stage 3 – Introductions



At least 2 weeks prior to the handover we would write to all of the owners to introduce ourselves and explain the date we will take over the management of the estate.

Stage 4 – Handover Day

Prior to or on the handover day we would obtain all of the documents, accounts bundles, insurance documents, risk assessments and all other documents (both physical or digital) for your estate.



We would undertake an in-depth handover meeting (either physically or over the phone) with the current property manager.

We would take receipt of any uncommitted funds and place in the respective accounts & any unpaid invoices due to be paid.

Stage 5 – Lease & Risk Assessment Audit



Within 3 month of the handover date, leases would be obtained & audited to ensure the correct interpretations have been applied and financial dates are being adhered to.

We would provide our assessment of the compliance on the estate to you as the directors and provide recommendations on actions to take.

Stage 6 – Financial Reconciliation

We have to allow the outgoing agents up to 90 days to provide the final bank reconciliations, final invoices, leaseholder balances & final funds. In practice this is usually 4-6 weeks.

At this stage we would write to all of the owners with their statement account now that we have their true balances.



Stage 7 – Handover Complete



Within 90 days of the handover date, and once the finance handover is completed, we would convene a full directors meeting (at the site where possible). We would explain how the handover process has been, any problems with the paperwork or finances.

SECTION 8

Client References

HE SAID/SHE SAID

THE IMPORTANCE OF CLIENT REFERENCES



Please see below for some recent customer testimonials. References are available on request, and we would be happy to put you in touch with one of our existing clients should we be successful at the tender stage.

Our Residents' Association decided, in late 2021, that a change of managing agent was essential if our wonderful estate was to progress. After lengthy research the residents agreed that Evolve could be our best choice and so we met with Benjamin Hume in November. His knowledge, enthusiasm and commitment were immediately apparent but prior to appointing Evolve we requested the almost impossible - that agent changeover occur before the end of the year, giving the Evolve team a mere 4 weeks to complete all necessary work and, although a tight schedule, Evolve succeeded and became our new, official agent on January 1st 2022. It was incredible work with excellent communication from Evolve throughout the entire process.

Progress since then has been smooth, with information and planning proving to be easier than ever with our 3-year project plan in place aided by super support and advice from the Evolve team.

We engaged Evolve Block & Estate Management services in the first quarter of 2021 and I am very pleased with the professionalism and expertise we have experienced to date. Initial information gathering and communication to introduce and familiarise themselves with our site and tenants enabled immediate action plans and longer term strategies to be agreed and implemented. We now benefit from retained services for minor works and emergency repairs and have a 10-year plan for major works which is currently being progressed thanks to Evolve's expertise in managing professionals to undertake these tasks.

Evolve have supported our Board with their technical knowledge in resolving issues professionally and competently on several occasions. Individual issues are now professionally dealt with by following standardised practices and procedures so that all parties receive the same fair treatment without fear or favour. Technology has been leveraged to support their services so we now benefit from a portal which enables people to log and track issues but Evolve have also been careful not to exclude those who prefer to continue using any of the other well established channels such as email or telephone.

Thanks to Evolve we are well positioned to progress with a programme of significant investment to maintain and improve our site for all our shareholders and residents.

Working with the Evolve team has been a truly exceptional experience. I've owned several flats over many years and me and my partner are really pleased with the constantly proactive performance by Evolve Block & Estate Management. From holding monthly drop-in resident sessions to regular newsletters and circulars and their website portal is exciting as it provides the residents and us directors with instant updates and makes sure everyone at the site knows what is going on, which is half the battle.

Our site has a number of special features, such as car lifts for high-end cars, all-glass sea-front elevations on a cliff edge, complex irrigation systems as well as it being until the last decade, the most expensive block of apartments per square feet in the UK, which all means we expect only the best from our property managers.

We have recommended Evolve to anyone we know looking for a competent agent, expecting value for money and a modern service fit for 2022.

Helen has been a superstar at our estate, which consists of 467 properties.

Helen has been instrumental overseeing the major works projects, most especially the recent fire safety works which she inherited when we transferred management agents to Evolve. One of the tallest buildings, over 18 meters, required balcony decking replacements and although Helen was taking over the project in its infancy, negotiating costs of materials which were ever increasing, she worked behind the scenes to find a way to lower the costs for the affected leaseholders. As Helen is always up to date with her technical knowledge of potential legislation coming through, she knew to wait for the PAS 9980 review, which enabled us to get the EWS1 form, without having to spend the £120k+ on this material, much to the relief of everyone concerned.

Helen provides a personable yet professional approach at the site and oversees everything technical from the communal water pumps to the lighting conductors and is always recommending what reports we are required but takes the time to explain why they are needed, what possible outcomes and how we can keep costs down but still ensure we provide a safe environment.

We are grateful to have someone so proactive looking after us at this site.

As a Director for Shady Bower Close, I have been working closely with Helen for the past year on a major works project. It was a particularly arduous project with an absent surveyor and a difficult contractor. Helen is very knowledgeable, takes ownership of the issues at hand, and does not shy away from difficult conversations.

She partnered with me, providing excellent counsel on next steps / recommended course of action, as well as keeping me sane with her great sense of humour. As a site with limited budget, Helen used her negotiation skills to secure a small discount on our major works - a huge success given the challenging characters on that project. She takes full responsibility for any task assigned to her, seeing it through to completion - key when building rapport and trust with leaseholders. As a Director, I believe Helen has our back, collaborating with the committee and leaseholders and look forward to working with her on our next major works.

I have worked with Helen Macrae for a number of years under several different managing agents and was delighted to hear the news that she had joined the Evolve property management team and would be working alongside us as Directors of Bishop's Park again. With Helen's experience and in-depth knowledge of all things property management, I consider Helen to be an absolute asset to us all.

Bishop's Park is a 41 occupancy property development mixing new build and Grade II listed properties held under 5 different lease types split into 4 blocks plus some houses, so it is quite a complex development. Despite being such a challenging development, Helen has used her knowledge and experience to ensure we conform to legal requirements such as Fire Regulations.

In her dealings with the Leaseholders and Directors, Helen has shown excellent customer service and when dealing with sensitive matters has shown diplomacy and a balanced approach to ensure no residents are victimised, when there are onsite issues. Helen remains professional at all times and always provides sound advice, and we are so happy that she is assisting with the co-ordination of our major works project, which we have been looking to have completed for over a year and now that she is involved the project is really progressing, with her team securing some fantastic quotations.

When emergencies or urgent matters arise, with Helen's track record, we always trust that they will be dealt with swiftly and efficiently. For the first time in many years, I personally feel that Bishop's Park is in safe hands with Helen and her team at Evolve.

I work with Kirsty Marshall as a director at two sites - Forge Field in Andover and Hill Street Court in Trowbridge. I find Kirsty to be responsible and effective in all matters concerning our property management, extremely accessible and responsive. Kirsty also has the ability to work under pressure.

Our Forge Field site is now in very good shape and is excellently managed. The Hill Street Court site is a different story as it is desperately historically underfunded with a huge amount of renovation work to undertake on a very limited budget since Evolve took over.

Kirsty is amenable at all times to obtaining alternative quotations to achieve the most cost-effective outcome. Kirsty has also tactfully and diplomatically dealt with a couple of head-strong leaseholders who have tried to use our limited resources for their own gain and this has not been easy. A less able person may have walked away from these negotiations but Kirsty has always remained determined to find a solution, for which we are all grateful.

SECTION 9

Site Visits & Contractors



Site Visits

Regular site visits are important to ensure the buildings and estate are in good repair. Sometimes items of maintenance are not reported to us, and we discover these on our site visits, which prevents further deterioration or damage. The frequency of visits is agreed with each client in accordance with their service level requirements and fee structure & is based on discussions and the likely demands and wear/tear to the estate.



Due to our service offering and locality we invariably visit our estates and blocks much more frequently than you would expect, especially in the initial stages, to meet with contractors and staff. This can be a number of times in the first few weeks. We use a specialist tablet-based application to record our site visits so we can provide a PDF of our most recent inspection if requested. Please contact us if you would like to view a sample document from a recent inspection.

We do offer our clients a frequent management visit to walk the grounds and property communal areas with them to monitor the condition of the assets and identify any repair or maintenance work and meeting residents/flat owners if required. Some of this time would be spent meeting with any 'in-house' staff and/or contractors to discuss ongoing and new issues, agree works required, actions to be taken and to ensure the grounds and properties are maintained to the standard required by the client.

Our Contractors

On aggregate, we look after many thousands of units, which is constantly growing, therefore we have a pool of local contractors in all our regions to approach for any tender process or routine maintenance and repairs.

The majority of our contractors have come to us via word of mouth or have been recommended to us and we do not charge a fee for contractor selection. We also do not receive any hidden commissions from any contractor and expect only the highest standard from our contractors.

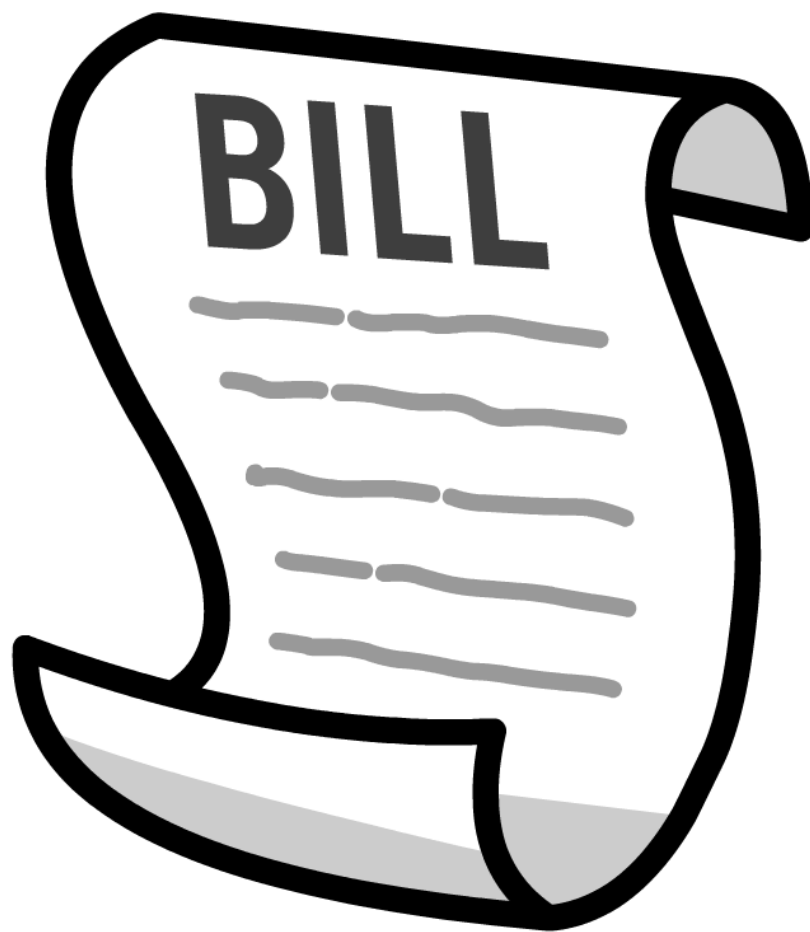


We are happy to work with existing contractors at a site that we take over or we can provide details of replacements to approach for tenders. We check all new and existing contractors for the relevant insurances, references and skills before we allow them to work on our portfolio.

We are always searching for good value tradespersons so if you wish to make a recommendation, please contact us.

SECTION 10

Costs & Charges



We aim to be completely transparent with our fee structure, whilst there are costs associated with a number of services requested, such as being asked to undertake company administration, handover costs, insurance work, etc. The management fee is the most important consideration and is the bulk of the administration fees that owners pay.



Working in, the capacity of the Company Secretary either for your RMC or as an Appointed Representative of Arthur J. Gallagher Insurance Brokers Limited, we are able to arrange insurance on your behalf. There are various types of insurance policies available, which we would be happy to talk through with you. These can range from a Blocks of Flats policy to cover the building, or Directors' & Officers' insurance which can be a vital policy to help protect the Directors in case of a claim is brought against them.

We charge a set fee on a per-year basis which is agreed in advance with all our clients and is enshrined in any management agreement. Any review is conducted annually and mutually agreed with the client expressly, we do not impose any unexpected increases or additional costs unless expressly agreed.

Our current average costs are:

Flat Management – From £200 per unit, per year.

The flat management fee is for those properties in a block which are either leasehold or commonhold and contribute towards building repair costs, such as roofs, cleaning, painting, health & safety, electrical works and general repairs to a communal living structure.

Estate Management – From £100 per freehold property, per year.

The estate management fee is for those houses on an estate which are either freehold or leasehold and they only contribute to grounds and estate management costs, where they do not have any communal building repair obligations other than external estate works.

All costs quoted are exclusive of VAT & we have a minimum fee of £2,495 per instruction.

Additional/Optional Costs

During the course of routine management, there may be additional costs or fees due, I have highlighted the most often, with the rest being included in our management agreement. A sample document is enclosed with this proposal report.



Company Secretary



This fee covers our time in acting as your company secretary, filing annual returns and accounts, dealing with share and member certificates and registering or resigning Directors and Officers of the company. Some of our clients maintain this service themselves, but most appoint us to do this as it requires considerable knowledge of Companies House forms and procedures.

Major Works

We charge a fee which covers the legal work in the consultation exercise, arranging the Schedule of Works, working with the surveyor, tender management, site meetings from start to finish & liaising with all of the residents before during & after the works.



The cost for this work is proposed & agreed in advance with the client BEFORE any costs are incurred to ensure clarity and transparency of costs. We are often the best value provider for major works administration in the regions we serve!

Legal Fees



Depending on the situation, such as legal advice being required on behalf of the RTM, general advice requests and liaising with solicitors is included in the management fee. Specific projects such as purchasing the freehold, substantial legal projects such as the directors facing any legal challenges, etc. would be chargeable additionally.

The cost for this work is proposed & agreed in advance with the client BEFORE any costs are incurred to ensure clarity and transparency of costs.

The management agreement is an important document which gives both sides an understanding of the costs, services & requirements, this is agreed in advance before we take over and we use the ARMA standard management agreement which is an industry approved clear and easy-to-understand document. Please refer to your management agreement for a full breakdown of all costs/fees applicable and what you should expect from us and what we need from you.



SECTION 11

Major Works



We regularly oversee/administer major works projects at our sites (pursuant to Section 20) from simple external decorations to large scale projects with tenders of £100k upwards.

An example of projects we have undertaken recently:

- **Communal Heating/Hot Water Replacement.**
- **Replacement of Lifts.**
- **Replacement of Sewage Tanks and Pumps.**
- **Roof Replacements.**
- **Building Underpinning.**
- **Complete External UPVC Upgrades.**
- **Complete Intercom Replacement or Upgrades.**
- **Internal Cyclical Decorations.**
- **External Cyclical Decorations.**
- **Complete Internal Lighting Upgrades.**
- **£10mil+ Cladding remediation projects.**
- **Multi-million-pound building warranty claims in a number of large estates.**
- **Fire door replacement bulk works.**

We have specialist surveyors who we appoint for a variety of major works projects and are able to approach the relevant tribunals for any judgements that are required.

SECTION 12

Compliance & Fire Safety



High Rise Fire Safety

We look after many blocks which exceed 18m which put them into the High Rise/Risk category in the most recent building safety legislation. This means we are experienced in knowing what is required of us and our clients in order to keep residents safe and the buildings properly compliant.

Health & Safety In Blocks of Flats

All of our sites with internal communal areas have some form of risk management, from a simple Fire Risk Assessment for a block on 2 stories, through to complex risk management, including the following

- Asbestos Risk Assessment** and ongoing management (such as communal floors, ceilings and roof construction)
- External Façade Risk Assessments** (such as cladding risk assessments and balcony decking checks)
- Legionella Risk Assessments** and ongoing management (such as shared water tanks and communal taps/sinks)
- Lift Inspection Reports** (LOLER's) (such as passenger lifts, car lifts, stair lifts, window cleaning machinery)
- Childs Play Areas** (such as children's play equipment in estate parks)
- General Health & Safety Risk Assessments** (such as roadways, paths, corridors and communal areas)
- Height Access Risk Management** (such as roof access equipment or anchor points)
- PAT Testing** (such as estate office computers and other powered equipment)
- Periodic Electrical Inspection Reports** (such as the 5-yearly fixed wire assessment for fuse boards)
- Tree Surveys** (such as number of trees, their health and recommendations)
- Dry Riser Assessments** (for sites with dry or wet riser equipment)
- Fire Alarm & Emergency Light Testing** (such as fire alarms, smoke alarms and emergency light testing and maintenance)

There are many more risk assessments which could potentially impact the management of your estate but our compliance team are experienced and have the contacts and suppliers to provide and manage all the risks.

Risk Platform

We have invested in a dedicated risk management platform, which allows us to add any type of risk profile for any site into its own sections. This allows our teams to view all the types of risk assessments and ongoing management needed for your site quickly and easily.

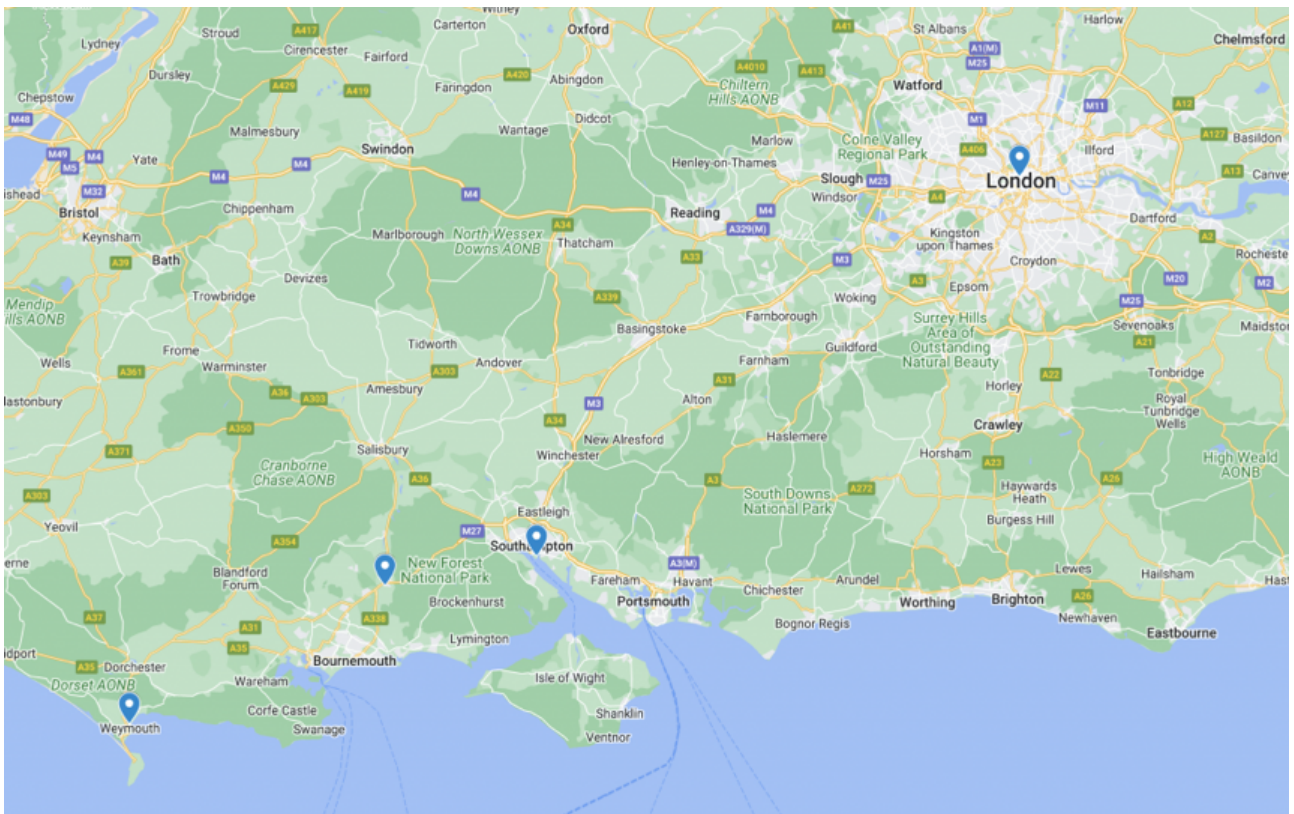
Team

Our compliance team is headed up with Helen Macrae, who has 20+ years experience in property compliance management, having headed up the compliance teams for national agencies, and supported by Byron Cooper as our compliance administrator.

We are confident there is not a type or size of development that will present any more complex risk management than those experienced by our teams in their careers to-date.

SECTION 13

Contact Us



Our Offices

We operate from four regional offices, **Ringwood, Southampton, Central London & Weymouth**

- **Ringwood** office being our central administration and contact centre alongside our **Southampton, Central London & Weymouth** offices.
- We have meeting & conference facilities at all venues if required & a warm welcome!
- Our offices are open Monday to Friday, 9am to 5pm.
- Our staff are often traveling around the region looking after our buildings & estates so do contact our offices to arrange either a site visit or meet us at one of our offices.

Please see below for our office locations, departments and colleague contact details:

Service Charge Accounts Team



To help provide a direct access to our service charge & company accounts team, they have a dedicated mailbox which can be used to reach them. Any questions about service charge accounts, balances, supplier payments, remittances and any other questions involving money and invoices, get in touch.

Contact the team on accounts@evolve-management.co.uk

Client Onboarding Handovers

To help with onboarding new clients following signed management agreements, we have a dedicated team and point of contact for outgoing agents to provide information to us on the estates and buildings. To provide information to us and allow us to centralise all handover matters in one single place, ensuring a swift transfer.



Contact the team on handovers@evolve-management.co.uk

House & Flat Sale Information Request Team



To help coordinate requests for LPE1/LPE2/FME1 packs and other requests or enquiries regarding our owners selling, transferring or mortgaging their properties, we have a dedicated team to help respond to enquiries and receive the relevant legal notices.

Contact the team on salesandtransfers@evolve-management.co.uk

Health & Fire Safety Compliance & Coordination Team

To help centralise our health & safety management of the estates and buildings, we have dedicated compliance officers who coordinate fire risk assessments, general health & safety assessments, along with any and all contracts and safety systems for our residents.



Contact the team on compliance@evolve-management.co.uk

Ringwood Office:

Phone: 01425 206 595

Address: 24a Southampton Road, Ringwood, Hampshire, BH24 1HY

Email: ringwood@evolve-management.co.uk

London Office:

Phone: 020 37 639 639

Address: 151 Wardour St, London W1F 8WE

Email: office@evolvemanagementlondon.co.uk

Southampton Office:

Phone: 02382 359 810

Address: OVIC, Ocean Way, Ocean Village, Southampton, SO14 3JZ

Email: southampton@evolve-management.co.uk

Weymouth Office:

Phone: 01202 800 456

Address: Basepoint Centre, Jubilee Close, Weymouth, DT4 7BS

Email: weymouth@evolve-management.co.uk