

# Management Brochure

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



## EVOLVE BLOCK AND ESTATE MANAGEMENT

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# WHO ARE EVOLVE BLOCK AND ESTATE MANAGEMENT?

## GAP IN THE MARKET

Evolve Block & Estate Management Ltd was established in 2016 to fill a huge growing hole in the market left by managing agents who had lost their customer focus and clients trust.

## UP TO DATE

We believe that you cannot be complacent in estate 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.

## BETTER THAN THE REST WITH 24/7 ACCESS

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.

## EXPERIENCE & LOCATION

We chose to locate our office in Ringwood so we can easily and quickly cover Dorset, Hampshire and Wiltshire. We manage blocks and estates throughout these three counties and have good relationships with many contractors in these regions meaning we can offer real value for money to all of our leaseholders. Having strong experience in lease interpretation, major works administration, insurance negotiations, service charge collection and accounting, we can provide a service to fit your requirements whilst keeping costs as low as possible.





# PROFESSIONAL MEMBERSHIPS, QUALIFICATIONS & TRAINING

## PROFESSIONAL MEMBERSHIPS

Evolve Block & Estate Management Ltd adhere to the RICS/Royal Institution of Chartered Surveyors 3rd Edition Service Charge Residential Code, the ARMA/Association of Residential Managing Agents ARMA-Q Standards and the IRPM/Institute of Residential Property Management code of practice.

**We are also a regulated member firm of RICS and associate members of ARMA so we are duty bound to adhere to the highest standards in our profession.**

## QUALIFICATIONS

In order to maintain and develop our knowledge base and keep up to date with changing legislation we are required to undertake a minimum number of hour's continual professional development and life-long learning every year.

## TRAINING

The whole team therefore 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.

Evolve holds professional indemnity insurance and all our client's funds are covered by client money protection. We are also a member of the PRS as our Ombudsman.



# THE LMP (LEASEHOLD MANAGEMENT PROFESSIONALS)

## 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](http://www.the-lmp.org.uk)



## THE EVOLVE TEAM

**Evolve holds professional indemnity insurance and all our client's funds are covered by client money protection. We are also a member of the PRS as our Ombudsman.**



**OUR MANAGING DIRECTOR IS BENJAMIN HUME  
BA(HONS) MARLA MIRPM ASSOCRICS**

**Ben can be reached at [ben@evolve-management.co.uk](mailto:ben@evolve-management.co.uk)**

Benjamin is a fully qualified lettings property manager with the ARLA (Association of Residential Lettings Agents), a fully trained and qualified member of the IRPM (Institute of Residential Property Managements) and an elected associate surveyor with the RICS (Royal Institute of Chartered Surveyors) Unlike most of our competitors this means the business owner is the technical lead 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.



**OUR ACCOUNTS LEAD IS RACHEL ROBINSON  
( Ba(Hons) MAAT )**

**Rachel can be reached at [rachel@evolve-management.co.uk](mailto:rachel@evolve-management.co.uk)**

Rachel has worked as a service charge accountant and company accountant for many years and worked specifically in the residential service charge accounts sectors. Rachel has helped to shape our accountancy practices within Evolve and has worked closely with our management software provider to introduce and test new advances in service charge financial management. Rachel is a member of the AAT (Association of Accounting Technicians). In Rachel's spare time she likes to play Hockey and enjoy time with her family.

## THE EVOLVE TEAM



### **OUR PROPERTY MANAGEMENT LEAD IS KELLY WALLER**

**Kelly can be reached at [kelly@evolve-management.co.uk](mailto:kelly@evolve-management.co.uk)**

Kelly is an experienced leasehold block and freehold estate manager, having looked after huge and complex estates for regional & national agencies. Kelly manages our day-to-day property management department, organising repairs, arranging regular contracts and suppliers. Kelly makes sure that fire safety and general health and safety risks are managed proactively at each of our estates, attending resident meetings, looking after insurance claims and our major works programs. Kelly is an affiliate of IRPM (Institute of Residential Property Managements) In Kelly's spare time she enjoys getting out onto the water in her boat with her family and enjoying everything the south coast has to offer.

### **OUR OFFICE ADMINISTRATORS ARE LOUSE BARKER-TUFFT & STUART MECHAM**

**Our administration team can be reached at [office@evolve-management.co.uk](mailto:office@evolve-management.co.uk)**

Louise & Stuart help provide office administration and invoice management and are instrumental in the management of financial data into our systems. They can both often be found by our scanner, helping us to continue as a paperless office and making sure we are able to manage each sites cash flow effectively, as well as liaising with suppliers, helping with leaseholder enquiries and supporting our department heads.

### **OUR CLIENT ACCOUNTS BOOKKEEPER IS HELEN NEEDHAM**

Helen works with us to prepare and undertake the annual accountancy packs for each site, ensuring the right information has been compiled ready for our external accountancy providers to produce accurate and comprehensive annual finance reviews.



# AWARDS & ACCOLADES



## 2017

Our Managing Director was Highly Commended in the News On The Block Property Management Awards (PMAs). Following a long commitment to the industry and leaseholders.

Our staff were also 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.

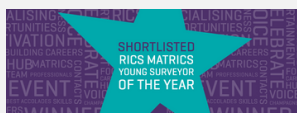
## 2018



Our Managing Director was recently awarded 'Regional Property Manager of The Year' at the 2018 News On The Block Property Management Awards, which cements us as one of the top performers in our industry nationally.

Our Managing Director was also a finalist in the Royal Institute of Chartered Surveyors 'Young Surveyor of The Year' award in 2018. This is a great achievement for Benjamin following the hard work ensuring the best standards of service as well as his involvement in regional & national industry events.

Our staff were 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.



## 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.

Our Managing Director has once again been shortlisted for the 2019 'RICS Young Surveyor Of The Year' award.



# SERVICE CHARGE FUNDS

## 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 signated reserve accounts where appropriate, and each reserve expense type is notionally separated by our software and accountancy package.

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 'Resident' 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 so that they can check bank balances, transactions and invoices 24/7 without us needing to provide reports. This is the ultimate in transparency which we are proud of.

**Evolve Block and Estate Management adhere to the RICS Service Charge Residential Management Code. Any insurance commission or other sources of income arising out of the management is declared to the client in our management agreement upon instruction. We therefore agree that no commissions or handling fees will be taken without the Clients permission or knowledge.**



# BUDGETING, KEEPING COSTS LOW

## 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 to explain accounts and other information to ensure they are better informed.



# SERVICE STANDARDS & SOFTWARE

## SERVICE STANDARDS & COMMUNICATION

We are always available to assist you 24/7 whether on-site, on the telephone, in our office or out-of-hours. You do not need to make an appointment to visit our Head Office in Ringwood but to ensure the person who wish to speak to is there, give us a quick call before setting off so we can make sure you are looked after. Our Ringwood office is open between 9.00am and 5.00pm Monday to Friday, we DO NOT close for lunch or switch our phones off at any time during the working day as we want to be available when our clients and customers are!

Evolve has a same day policy with regard to responding to telephone call-backs and emails where reasonably possible, as we've all experienced issues having been promised a call back and not receiving it so we know how frustrating this can be.

## CUTTING EDGE SOFTWARE, WEB PORTALS & MAINTENANCE REPORTING

### RESIDENT – BLOCK MANAGEMENT SOFTWARE

We use a cloud-based platform which enables directors and leaseholders to log in and view information on their block 24/7 for complete transparency if required. Leaseholders can be given access to their individual service charge information and balance, annual service charge budget, ongoing maintenance tasks. Directors have special and enhanced access to financial reporting and real time bank account information, cash balances, debtors, creditors and access to uploaded/scanned files. The platform also enables residents to log maintenance tasks and requests for our attention. As the system is cloud based users can log in using their iPad's, iPhone's or computers from anywhere with a web browser.

**To find out more, visit: [resident.uk.com](http://resident.uk.com)**



The online property solution to self manage blocks and estates

# STANDARDS & OUT OF HOURS SERVICES

## SERVICE STANDARDS & COMMUNICATION

We use an online maintenance reporting service, FixFlo. FixFlo is an online portal which can be accessed 24/7 by visiting the following site: [evolvemanagement.fixflo.com](http://evolvemanagement.fixflo.com)

This service allows ANYONE to report maintenance, including leaseholders, freeholders, tenants, letting agents, etc. No log in or account creation is required. Just click the link, follow the pictures of common problems and complete the form, you can even upload photos to the report.

The FixFlo system has built-in problem solving to help prevent unnecessary maintenance callouts or further damage. For example in an escape of water it will explain to the person reporting the steps they need to take now to prevent further damage.

Of course, if the situation is more urgent the maintenance reporting system will flag this and ask you to contact us more urgently!



## KPR Reports – Inspection App

Evolve has invested in the latest property inspection technology and our regular inspections are carried out using the Keystone Report application on our tablets. This comprehensive reporting app is dedicated to block managers and allows comments, photos and maintenance notes to be added to each section and a user-friendly report document is generated to allow our staff to action problems found and let our clients know the condition of their property.

# OUT OF OFFICE SERVICE

Out-of-Hours coverage is one of the most important services we offer, as unexpected emergencies do not discriminate whether it happens during the day, evening or weekend.

We have a dedicated service for out-of-office emergencies, with simple and basic instructions on what to do and who to call. Once our offices close, anyone can contact our provider, owners, tenants or letting agents if something should happen.

This service is integrated into our online maintenance reporting system but details can be found on our answerphone when we are closed or via our dedicated website page.



# OUR CONTRACTORS & SITE VISITS

## 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 directors and freeholders 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 & SITE VISITS

## OUR CONTRACTORS

On aggregate, we look after many hundreds 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. We also do not insist on our own contractors at your blocks, if we take over the management and you are happy with the services in place, we would see no need to change!



# MANAGEMENT FEES

## MANAGEMENT FEES

We aim to be completely transparent with our fee structure, however the the two regular costs are:

**Management Fee** – 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.

**Company Secretary (If Applicable)** – 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.

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.

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.





# ARREARS & BREACHES OF LEASE

## ARREARS

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 paid by the debtor, so it does not cost the client or service charge.

## BREACHES OF THE LEASE

Do you have a leaseholder in breach of their lease? We often deal with breaches of leases, whether small or serious. We often provide initial advice on contact and options and where we can refer you for specialist legal advice to take the breach further. Do not think you are on your own when something goes wrong, we'll make sure to manage the process for you.





# 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.**

Such projects have been:

- 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

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



# ESTATE MANAGEMENT OPTIONS- FULL & FINANCIAL MANAGEMENT

## FULL MANAGEMENT

**We offer a few different options for management at your estate. We do not just offer a management service; we tailor it to your estate and agree any specific conditions and requirements. However, we have summarised the main services we provide our clients and a brief breakdown of what you should expect from each service.**

Our Fully Managed service is our most popular service and to find out more, contact us today. We have provided a summary of what you should expect from us if we manage your estate. This list is not exhaustive though, and we are happy to discuss a bespoke service for you.

We undertake full and comprehensive handovers from your previous agents, and we ensure everything is covered, collected and managed from day one. Our staff audit all handovers to make sure there are no problems and the finances and compliance are in good order.

If required, we will contact Companies House and arrange the change of details to be the point of contact for all your company administration

We open dedicated client bank accounts and reconciling these on a regular basis using direct bank feeds into our systems, as well as paying supplier invoices & collecting leaseholders' contributions

We work with a number of external service charge accountants to complete annual accounts on time and to the ICAEW Tech 03/11, ARMA & RICS 3rd Edition Service Charge Code requirements.

We visit our estates a minimum of every 3 months and produce a report to make sure contracts are being undertaken as instructed, there are no maintenance issues and provide visual reassurance to residents.

We use a number of technological software advances, such as a dedicated tablet-based inspection app, an online 24/7 maintenance reporting system for residents, tenants, leaseholders, directors and freeholders to use.

We use the latest in block management software called 'Resident' which allows the client to log in 24/7 to view supplier invoices, bank balance and transactions, leaseholder balances and arrears as well as other files and information.

# ESTATE MANAGEMENT OPTIONS- FULL MANAGEMENT

We have a dedicated arrears and debt recovery process ensuring a robust proactive approach to ensure cash flow is not interrupted.

We constantly review the on-site contractors and maintenance agreements to ensure value for money and re-tender any contracts

We regularly undertake major works to our estate (Section 20 Landlord & Tenant Act 1985) from simple external decorations to large complex works.

We work with a number of local surveyors to draft plans and work schedules as well as project management to ensure any works are completed as requested for the budgets agreed.

We provide a review of the lease and confirmation of correct financial periods, service charge invoice dates, deal with breaches of the lease by leaseholders and provide advice to the client on their covenanted responsibilities.

We can help manage any processes involved with lease extensions & buying shares in your freehold.

We have a dedicated out of hours provider, covering our entire portfolio 24/7 365 days a year to make sure there is peace of mind.

We work with our clients to create service charge budgets, taking into account any long-term maintenance plan, estate contracts (cleaning, grounds maintenance, etc.).

We work with a number of regional and national insurance brokers who specialise in block & estate insurance, to obtain the most competitive quotes & cover for you. We also undertake regular valuations to ensure the cover is adequate.

We work with our clients to produce regular long-term maintenance plans to guide service charge collections and contributions, making sure communication to leaseholders is paramount.

We ensure our staff and property managers maintain the best standards in customer services and technical skill, having been regularly recognised for our operation standards in national property management awards.

# ESTATE MANAGEMENT OPTIONS- FINANCIAL MANAGEMENT ONLY

## FINANCIAL MANAGEMENT ONLY

**Did you know that there is a new way to manage your property without needing to hand over full control to a managing agent? We offer a financial management only service to clients where in conjunction with our online software, we can undertake the following:**

Receive the budget from the client and invoice out to leaseholders using the correct templates and processes

Open client accounts and account for incoming payments and expenditure.

Upload & pay supplier invoices received from the client.

Arrange for the freeholder/directors to be able to log into their own dedicated portal to view bank balances, transactions, supplier invoices received, leaseholder balances and much more.

We can offer to arrange the insurance & be company secretary if required.

We do not undertake proactive debt recovery or instruct works, these remain with the client to run the building as they see fit but always happy to recommend suppliers and sources of external advice if needed.

The client/freeholder/directors remain as the point of contact for leaseholders and residents queries.

As the client is able to manage the day-to-day management themselves, we can offer this service at a lower cost than the full management service.

If this is a service you are interested in, do let us know when you request a tender for the management of your estate.



# ESTATE MANAGEMENT OPTIONS- DEVELOPERS SERVICE & BUILD-TO-RENT

## DEVELOPERS SERVICE & BUILD-TO-RENT

We currently take regular instructions from regional developers and manage their subsequent residential leasehold developments and conversions. We offer a dedicated service to developers where we can advise initially on the planning, communal services to be provided, construction of the lease, etc. It is considered a turn-key solution, working with us either early or late on in the process and our advice is 100% free.

We also regularly work with developers on snagging issues in the first 12 months following the completion of the build. We understand things may not work or need tinkering, we can provide this service.

We also manage Build-To-Rent sites, where the freeholder owns all of the flats and the freehold, with the tenancy management dealt with by our supervision to provide a single point of contact. Our senior property manager is a member of the Association of Residential Lettings Agents so we can offer full lettings management for Build-To-Rent clients.



**"Communication and Trust  
are the two main ingredients  
for successful relationship"**

### **REQUESTING REFERENCES**

These are available upon request. We have so many happy clients who would be happy to speak to you and if need be, we are happy to provide a demonstration of our software, accounting processes, or any other aspect of our management if required. We often invite prospective clients to our office to meet with our staff and discuss any particular concerns and ensure they are addressed or provide a reference from an existing client in similar circumstances.

### **DATA PROTECTION & GDPR**

Evolve Block and Estate Management are registered with the Information Commissioner's Office and complies with the provisions of the Data Protection Act 1998 and GDPR Rules. All records are stored online and if required in hard copy for the statutory minimum period of time, being six years as standard, and if required as a result of indication or notification for longer as required. All paper documents are stored under lock and key and online files help in an encrypted cloud server which is backed up 3 times a day.

### **COMPLAINTS HANDLING PROCEDURE**

We take feedback and complaints very seriously and will work with any unhappy party to rectify what is within our power to rectify or help guide them to the most appropriate source to resolve the problem. If something goes wrong, please get in touch with us so we can ensure the Complaints Handling Procedure is followed and we can provide a copy of this document upon request.



*Evolve Block & Estate Management Ltd is a member of The PRS.  
Member No: PRS007543*

*For more details, please visit [www.theprs.co.uk](http://www.theprs.co.uk)*