



Annual Report
2011

ARHM, Southbank House, Black Prince Road, London, SE1 7SJ

Tel: 020 7463 0660 Fax: 020 7463 0661 Email: enquiries@arhm.org

Website: www.arhm.org

BACKGROUND TO THE ASSOCIATION OF RETIREMENT HOUSING MANAGERS

The ARHM is a unique organisation in the housing field, and one which maintains a low profile outside its specialist field, given the size of its membership. But it is one which has helped to bring about a quiet revolution in the management standards for a whole sector of housing for a vulnerable group of residents, the occupiers of privately-purchased (mainly leasehold) retirement dwellings.

Unique organisation

The ARHM represents managers of private retirement schemes, and around two-thirds of our membership are housing associations. ARHM members manage more than 105,000 out of the estimated 121,000 units of retirement housing. Combine that with all the largest private sector management companies in the country, and you have a housing body which is unique in its capacity to bridge the commercial and the voluntary sectors”.

The secret of the ARHM’s success has been a recognition across the whole retirement housing sector that poor management standards, which were common in retirement housing ten or fifteen years ago, were threatening to damage the public perception of the whole sector. This shared interest has driven management companies and RSLs to pool their rivalries and join forces, to drive up management standards for the benefit of all, and most of all for the benefit of retired leaseholders themselves.

Cross-fertilisation of knowledge and ideas

One of the main reasons for the growing strength and popularity of the ARHM is the practical value and help, which its members feel they get from it. The regular regional forums, seminars and conferences are well attended by practitioners keen to share information and best practice with others, regardless of narrow-minded commercial interests.

The ARHM has carved out a reputation for helping to develop public policy in the important area of housing for elderly people. This role includes responding with an authoritative voice to a wide range of Government consultation papers, such as the major changes recently proposed to leasehold accounts under the Commonhold and Leasehold Reform Act. The website (www.arhm.org) has a members’ only section which is well-used as a helpline for members seeking advice from others on a range of practical problems arising in day-to-day leasehold management.

ARHM Codes of Practice

The ARHM Code of Practice for England, which was approved by the Government under the Leasehold, Housing and Urban Development Act 1993, aims to promote best practice in the management of leasehold retirement housing, regardless of whether the services are provided by private companies or housing associations. It not only sets out the statutory obligations that apply to the management of leasehold properties, but also sets out additional requirements which should be followed as a matter of good practice. The Code of Practice forms a benchmark for Leasehold Valuation Tribunals in the exercise of their role in relation to the management of retirement leasehold properties. This makes the code an extremely useful source of reference for managers, and also for leaseholders as it provides clarification around the level of service they can expect to receive.

The ARHM has also achieved success on a national basis. The Code of Practice for Scotland was launched by Alex Neil MSP, the Housing and Communities Minister for the Scottish Government on 26 October 2009.

The Code of Practice for Wales was successfully launched by Jocelyn Davies AM, the Deputy Minister for Housing at the Senedd in Cardiff on 22 November 2010. The ARHM remains committed to raising standards in retirement housing across the whole of the UK.

The ARHM Code Review Group has been formed to revise the existing Code. The Group is chaired by Bob Bessell. Its members consist of representatives from ARHM Member organisations, the CLG, LEASE, Age UK, Leasehold Experts, Leaseholders and other organisations/trade bodies with an interest in retirement housing.

With its growing membership, a new Code of Practice and a developing reputation for expertise in its specialist field, the future for the ARHM is looking bright!

OBJECTS OF THE ARHM

The main objects of the ARHM are:

- To promote high standards of practice and ethics in the management of retirement housing and in the provision of services to residents.
- To set standards for membership of the association and to promote quality and professionalism through training and education of its members.
- To monitor standards of members including implementing a compliance-testing regime so that further improvements in standards can be made.
- To consider and comment on matters affecting the association and retirement housing and to promote the views of the association in the business, social, education and political communities.
- To investigate and determine complaints against members.
- To provide the principal forum for the discussion and progression of issues facing retirement housing.
- To promote the benefits of retirement housing.

ARHM BOARD 2010-2011

Chair - Debbie Matusevicius, Anchor

Vice-Chair - Bernadette Rose, RLHA (*resigned Nov '11*)

Treasurer - Sarah James, Retirement Security Ltd

Andy Patchitt – Longhurst & Havelok

Bob Bessell, Retirement Security Ltd

Cecilia Brodigan, Anchor (*resigned Jun '11*)

Cliff Goodwin – Wales & West Housing Assoc.

James McCarthy, Hanover HA (*resigned June '11*)

John Evans, Jephson Housing Association

Keith Edgar , Peverel Retirement Ltd

Lorraine Murphy – Grange Management Ltd

Margaret Waters , Peverel Retirement Ltd

Peter Barker, Harewood Housing Society

Simon Crewe, Goldsborough Estates (*resigned Nov '11*)

BOARD ATTENDANCE 2011

The Board met 6 times during the year.

Individual attendances were as follows:

Andy Patchitt.....	4/6
Bernadette Rose	4/6
Bob Bessell.....	6/6
Cecilia Brodigan.....	3/4
Cliff Goodwin.....	4/6
Debbie Matusevicius.....	6/6
James McCarthy.....	3/3
John Evans.....	3/6
Keith Edgar.....	3/6
Lorraine Murphy.....	6/6
Margaret Waters.....	5/6
Peter Barker.....	5/6
Sarah James.....	2/6
Simon Crewe.....	3/6

DOROTHY UWOTA
ADMINISTRATION MANAGER

CHAIRS REPORT FOR 2011

During my first year in office I am aware that the current economic climate has posed significant challenges for many of our member organisations. This has resulted in many being forced to significantly reduce operational costs whilst simultaneously maintaining the focus on providing leasehold customers with the best possible value for money in the services that are delivered. In addition, the current concerns amongst many leaseholders around pensions not increasing in line with RPI places managers under increased pressure to keep service charges and management fees to a minimum.

The combined effect places managers in a position where there is a delicate balancing act between delivering services at a reduced operational cost whilst still maintaining and improving service standards. However, despite the issues currently being faced, I am pleased that the majority of members recently renewed their annual subscription and a number of new organisations have also joined the ARHM over the past year. I feel this demonstrates the commitment amongst our members that whilst we may face fiscal challenges and although the regulation of the sector is not currently on the political agenda they remain dedicated to improving standards within retirement housing by association with the ARHM.

In turn the ARHM remains equally committed to supporting its members during the coming year.

I would like to thank the ARHM Board of Directors and my former Vice Chair for not only their support during my first year in office but also for their contributions to the ARHM over the past 12 months. I must also reserve special thanks to Bob Bessell one of the ARHM's long standing Board members for all of the hard work he has put into overseeing the current review of the ARHM Code of Practice. I would

also like to thank those who formed part of the Summer Conference Committee and the Administration Manager whose combined efforts helped to ensure this year's 20th Anniversary event was a resounding success. Finally, I would like to thank all members for their continued support of the ARHM.

DEBBIE MATUSEVICIUS

STANDARDS COMMITTEE REPORT

With the governments continued reliance on the property management industry to self regulate and the challenges from lobby groups, the ARHM Code of Practice has become even more important in the promotion of high standards and ethics in the management of retirement housing.

The Standards Committee have met bimonthly throughout the year to hear issues which have exhausted the member company's own complaints procedure. It also provides a mechanism for leaseholders to escalate issues relating to the possible breach of the ARHM Code of Practice.

The core Standards Committee comprises: Debbie Matusevicius, Cliff Goodwin, Lorraine Murphy, and John Evans with other Board members called in to attend as required. With the launch of the Scottish and Welsh Codes, it has already been necessary to draw on the expertise of Board members who represent these countries.

The ARHM endeavours to respond to all enquires and keep within published response time scales. It is interesting to note many of the issues raised by lessees reinforce the need for better information and education about the sector in general.

Some statistics:

Number of complaints heard by Standards Committee in the year: 12

Number of issues that went to appeal: 2

Number of issues closed: 10

Number still live: 2

Examples of complaints received:

- Variation of Special Services
- Accounting for service charges
- Accounting and process for arrears collection.
- Sale of Managers flat.
- Notice period for meetings
- Complaints procedure / response times

I wish to take this opportunity to thank the members who have given up their time to sit on this committee and for their expertise and hard work throughout the year and to Dorothy for coordinating the activities of the committee.

LORRAINE MURPHY

SOUTH EAST REGIONAL FORUM

In 2011 I have been pleased to see that our attendance at the South East Forum has maintained excellent numbers as well as interesting and worthwhile subjects and topics to review.

We still only meet twice per year, spacing roughly between the winter and summer conferences, this seems to be the most popular avoiding the danger of becoming a chore rather than a pleasure.

Our first meeting in April was to see 'Harry Smith', ex Mayor of Gravesham and recently retired nursing executive of Darent Valley hospital, deliver an excellent talk on the subject of elderly abuse and how to spot it even in sheltered housing, very often vulnerable adults

can be abused and/or neglected, but go unnoticed.

We also had Joy Akah-Douglas from LEASE who is always "a joy" and does a first class job in keeping us abreast of what could be just round the corner.

On 28th September we met again and explored various ideas on how to motivate scheme managers to organise activities, to both stimulate the lives of residents and enhance the reputation of their particular complex.

Joy was also in attendance and we had difficulty in keeping within the allotted time with so much interest and so many questions.

I extend my sincere thanks to all of you who have attended our South East Forums and wish you seasons greetings, and very much look forward to seeing you all next year

TONY PRITCHARD

NORTHERN REGIONAL FORUM

As always, the Northern Forums held this year were very well attended

The ARHM has also received very positive feedback around the subjects covered, with those attending advising that they found the days both interesting and informative.

We have hosted some exceptional speakers during the year, including Joy Akah-Douglas from LEASE who delivered a full day session which covered dealing with disruptive residents and also right to manage and understanding leases, which are key areas around which managers must have a good understanding.

We had a number of colleagues attending who were relatively new to block management and who advised that they had found the sessions extremely helpful in increasing their understanding in various aspects of leasehold management.

I would urge any members who have not had the opportunity to attend this year's Forums to attend those to be held during 2012 if at all possible. There is no charge to attend these events and they provide not only a great opportunity to receive updated information and training, but are also a useful platform to discuss current issues and share best practice with other colleagues in the industry.

I would also like to thank our hosts, Harewood Housing Society, who, once again, have offered the use of their premises throughout this year and Dorothy for the assistance she has provided organising these events.

DEBBIE MATUSEVICIUS

SOUTH WEST FORUM

We met just once this year.

Our speaker was the ever knowledgeable Joy Akah-Douglas of LEASE.

The topics for discussion included Subletting, Right to Manage, Exit Fees and the Disability & Discrimination Act.

There was a great deal of audience participation and feedback received attendees so far has been extremely positive.

I am grateful to our hosts Girlings Retirement Rentals for letting us use their offices once again and for providing a superb buffet lunch.

The date of our next meeting is 8th March 2012 at the offices of Girlings once again and everyone is welcome.

Finally, I would like to thank Dorothy for all the work she puts into organising not just the regional forums but all the ARHM's events.

DANIEL HOPE

THE ASSOCIATION OF RETIREMENT HOUSING MANAGERS DETAILED PROFIT & LOSS ACCOUNT

Trading and Profit and Loss Account for the year ended 30th June 2011

	2011		2010	
	£	£	£	£
Turnover				
Subscriptions	75,722		75,391	
Seminars, training courses and conferences	43,785		35,286	
Publications	1,928		2,552	
		121,435		113,229
Cost of sales				
Seminars, training and conference expenses		31,400		30,051
GROSS PROFIT		90,035		83,178
Other income				
Bank interest receivable		13		8
		90,048		83,186
Expenditure				
Administrators salary	37,130		36,506	
Compliance fees	402		(1,500)	
Consultancy fees to policy advisor	3,333		24,900	
Insurance	861		842	
Miscellaneous expenses	153		15	
Management services	15,294		13,911	
Travelling expenses	1,190		1,283	
Venue costs for meetings	4,264		3,441	
Website re-design	2,625		2,105	
Auditors' remuneration	1,500		1,500	
Depreciation of tangible fixed assets	95		112	
		66,856		83,115
		23,192		71
Finance costs				
Bank charges		3		(744)
NET PROFIT		23,189		815

This page does not form part of the statutory financial statements

ARHM MEMBER ORGANISATIONS 2011

Accent Foundation	Irwell Valley Housing Association Ltd
Accord Housing Association Ltd	Isos Housing Association
Aldwyck Housing Association Ltd	Jephson Homes Housing Association
Anchor	'Johnnie' Johnson Housing
Bromford Housing Group	Kingsdale Group
CDS Co-operatives	Landbridge Ltd
Clement Keys (Chartered Accountants)	Longhurst & Havelok Homes
Cognatum Ltd	Mainstay Residential Ltd
Contour Housing Association	Midland Heart
Countrywide Managing Agents	Millstream Management Services
Crabtree PM Ltd	Network Stadium Housing
Devon and Cornwall Housing Ltd	Orbit Housing Association
Emerson Management Services	Peverel Retirement
Exclusive Property Management Ltd	PlumLife
Galbraith Property Services	Raglan Housing Association Ltd
Genesis Housing Association	Remus Management Ltd
Girlings Retirement Rentals	Retirement Lease Housing Association
Goldsborough Estates Ltd	Retirement Security Ltd
Grange Management Ltd	Riverside Home Ownership
Guinness Northern Counties	Rosemary Simmons Memorial HA Ltd
Hanover Housing Association	Sanctuary Housing Association
Harewood Housing Society Ltd	St George's Park Ltd
Hightown Praetorian & Churches HA Ltd	Sussex Housing & Care
Home Group	Town & City Management Ltd
Housing 21	Wales & West Housing Association Ltd
Hyde Minster	Waterloo Homes
I Care Extra Care Ltd	Westcountry Housing Association
Ian Gibbs Estate Management	