

Chelsea Bridge Wharf



Tender for Management Services
at
Chelsea Bridge Wharf,
374 Queenstown Road, London SW8 4NU



11th February 2022



ROGER
SOUTHAM

Introduction

- Chelsea Bridge Wharf was developed by Berkeley Homes and comprises several different buildings in a mixed use estate fronting on to the Thames. There is different ownerships across the Estate. All are agreed on working together to appoint one manager for the whole estate.
- Enclosed within this invitation to tender is :
 - Key dates
 - Information about the buildings
 - List of services required
 - Questionnaire
- I have approached your firm as you already meet certain criteria my client and the leaseholders are seeking. Those that can demonstrate excellent management of service charge, maintenance issues, supply and management of services will be considered for the management contract.
- All information provided will remain confidential. Please be assured that I have no affiliation or bias towards any company and decisions will be on the content of tenders submitted and interviews.
- Your submission should address the questions included in this tender but if there is other relevant information you wish to include please feel free to do so.
- Submissions must be supplied as per the timescales listed in the key dates section. Requests for access, any queries or correspondence should be sent to me on the contact details below. Your submissions should be sent electronically to me by 5pm on the 28th February 2022.

- Roger Southam
- T: 07967 555484
- E: roger@rogersoutham.co.uk



Key Dates

- ✓ ITT distribution 11th February 2022
- ✓ Receive back tender responses 28th February 2022
- ✓ Assess tender submissions to produce shortlist w/c 7th March 2022
- ✓ Invite shortlist in to interview with panel w/c 21st March 2022
- ✓ Allow for any follow up or clarification 1st April 2022
- ✓ Negotiate management agreement and appoint managing agent 11th April 2022
- ✓ Managing agent takes over running of buildings 1st August 2022



Property Description

Chelsea Bridge Wharf Chelsea Bridge Wharf apartment complex sits on the south side of the Thames close to Chelsea Bridge. It occupies a plot of land between the river and Queenstown Road with Battersea Power Station To the east and Battersea Park to the west.

The development is made up of 9 apartment blocks arranged around a central landscaped parkland and piazza. From the Piazza level there's no car entry – they all arrive via the subway car park – so it creates a safe and secure space where award winning water gardens with fountains forms an oasis between impressive glass buildings. secluded gardens and ponds on site. On-site facilities include a private health and fitness centre located in a 4-star Pestana Hotel.



Property Description (Continued)

The tender is for the following six buildings only at this point in time: Eustace; Oswald; Centurion; Howard; Warwick; Horace

The other three buildings and the estate are under the control of a different freeholder who at this point is not participating in the retender exercise.



Management Services

We are inviting suitably qualified managing agents to tender for the block management contract of Chelsea Bridge Wharf. The following is a list of services required by the successful managing agent in the course of managing the buildings, though please note this is not exhaustive:

- Manage common parts and service areas, including arrangement and supervision of maintenance in accordance with the terms of the leases
- Provide clear and transparent communication to the client and leaseholders of all issues
- Provide prompt responses, action and communication of issues to leaseholders
- Report any significant lessee issues that will impact on services and lessees quiet enjoyment
- Communicate to the clients any risks or potential risks of a legal, financial or reputational nature
- Follow the Royal Institution of Chartered Surveyors (RICS') complaint process should a leaseholder raise a grievance
- Appoint efficient and effective contractors who have demonstrated strong skills and specialisms
- Promptly manage routine repairs and routine maintenance
- Administer contracts entered into on behalf of the client in respect of the property
- Discharge payments in respect of contracts entered into on behalf of the client in relation to the property
- Manage all suppliers and contractors including implementation of disciplinary action or retendering if necessary
- Advise on block insurance and any other appropriate cover as necessary
- Administer insurance claims
- Ensure compliance with lease terms
- Stand beside head leaseholder/freeholder on any FTT claims with regard to management matters
- Manage routine enquiries from the client, lessees or their solicitors
- Respond to solicitors' and lessees' enquiries regarding Licence to Assign and alterations
- Hold keys and manage access to common parts as required
- Conduct regular site inspection of the property's common parts, as can be inspected safely and without undue difficulty, to ascertain if maintenance, repairs or any other issues need addressing
- Prepare an annual service charge budget in accordance with the development's leases to be sent out at least one month before the new service charge year starts
- Ensure correct VAT and taxes are applied to invoices for residential communal areas
- Ensure funds are held in a separate bank account to other developments the managing agent may be responsible for
- Bill and collect service charge demands as per the lease
- Prepare draft year-end accounts and arrange independently audited or certified accounts
- Ensure adequate credit control is implemented to eliminate or limit service charge arrears
- Bill and collect annual ground rent on behalf of the freeholder
- Manage risk by ensuring the property adheres to strict fire and health and safety compliance
- Advise client on all relevant legislation and regulation that may affect the property
- Provide evidence that suppliers who are awarded contracts offer the best value for money while delivering a quality service/ product
- Ensure repairs and services are carried out effectively, efficiently and to the high standards expected.
- Comply with all aspects of the RICS Service Charge Residential Management Code



Questionnaire

General information

- Provide all relevant company details including the names and qualifications of all directors.
- How many years has your company operated in the block management industry?
- Provide a list of other services your company provides outside of residential block management.
- How many properties do you manage (please include the number of units and number of buildings)?
- Where is your company based? How many satellite offices do you have and what is their proximity to Chelsea Bridge Wharf?
- List any professional or trade bodies to which your firm and staff belongs.
- Confirm you meet at least 4* rating on the Building Safety Council, 5* Occupational Health and Safety Audit, or ISO45001
- Provide full details of your professional indemnity insurance.
- Are you registered under the Data Protection Act? If so, please provide your registration number.
- Provide proof of financial probity and provide details of any County Court Judgments, Individual Voluntary Arrangements or bankruptcies.
- Have any complaints been upheld against your company to any professional body?
- Provide a copy of your complaints procedure.
- Provide details of all your proposed management fees including VAT? This should include all ancillary charges, additional costs, recruitment fees etc
- Please outline out of hours service and any charges for the same including VAT?
- Please provide a list of buildings managed and brief details of the number of apartments and description of the buildings



Questionnaire (continued 1)

Management and Maintenance

- Set out your plan to ensure services commensurate to well managed residential accommodation are provided and maintained at all times, including both management and staff structure, staffing levels and how operational excellence will be maintained once the agreed. This may be presented in any fashion considered appropriate but consideration should be given to illustration by way of management/staff structure 'tree'
- Provide two brief case studies highlighting management and provision of service appropriate to the highest quality residential accommodation.
- Describe your experience in providing and maintaining a buildings requiring different service levels and relying on some joint services and how you mitigate impact and effect.
- Describe your services and processes and detail anywhere third party providers are used.
- Does your company take a proactive approach towards property management issues? Provide two examples where a proactive approach has benefited a building you manage.
- Are there any biased relationships between your company and the contractors you employ, for example, shared directors or personnel between the companies? If so, please provide all relevant details.
- Do you charge a fee for contractor selection and/or receive a commission from their appointment if:
 - Contractors are chosen by you?
 - Contractors are chosen by the client?
- Describe your process for appointing a contractor/ supplier and detail what criteria is used. Describe any contractual clauses/ penalties for delivery of poor service.
- How do you manage contractors that deliver a poor service or fail to fulfil their contractual agreement if there are no contractual clauses for redress? Please provide two examples of when supplier redress was required and the outcomes.
- How do you ensure that quality is achieved for works or services provided through service charge funds? Please describe any systems, processes or checks that are carried out.
- Do you use your own supplier contracts or rely on theirs? If your own, please supply a copy.
- Provide an example of a complex maintenance issue you encountered, how it was managed and how clients/leaseholders/residents were kept informed of the situation.
- What systems are in place to ensure both health and safety and fire safety compliance is adhered to?
- What is the time period expected for dealing with daily maintenance issues e.g. replacing lightbulbs or fittings or fixing door closers?



Questionnaire (continued 2)

Communication and reporting

- What is your standard response time to:
 - Emails
 - Telephone messages
 - Website contact
 - Postal correspondence
- How do you communicate financial and accounting information to leaseholders and what information is provided.
- How do you communicate maintenance updates to leaseholders?
- Will the property be assigned specific property managers? If so, please provide details of their experience.
- Will leaseholders have direct communication with the property manager via a direct landline, mobile or email?
- Do you have flexibility to be able to cater to specific communication needs of clients, e.g. timescales for responses, frequency of updates and financial information and implementation of online systems?

Financial and accounting

- Where and how do you keep service charge monies, how are they administered and who receives the interest?
- Please provide an example of the budget or variance analysis typically provided to clients?
- What means of payment and facilities are available to leaseholders?
- Please explain the extent of your experience in setting service charge budgets to include collection for major works and planned preventative maintenance
- Please provide timelines for sending out demands; budgets; certified accounts?

Other

- Please provide evidence to validate claims of service levels explained and offered
- Please provide any other details you believe are relevant to this tender





Thank you

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