



# The Property Institute

## TRAINING PROGRAMME SPRING/SUMMER 2024

TPI's Spring/Summer training programme encompasses a wide range of courses designed to equip you with the essential knowledge and vital skills crucial to excelling in your role. Whether it's introductory courses for new starters, guides on reading leases, building safety, issuing Section 20s, or dealing with service charge accounts, our comprehensive training curriculum caters to all facets of your professional growth. Delivered by industry experts, operating within their respective subjects on a day-to-day basis, each course guarantees expert insights drawn from real-world experiences.

Every training course comes with full CPD certification. And, while we are beginning to offer in-person courses again, you'll find that most of our training courses are run online. We are also able to offer many of our courses 'in house', so please reach out if this is something your firm may be interested in.

All TPI members, both individual and firm, receive the members price.

Firm members can also benefit from our block booking discount. **Purchase 10 training credits and receive a 20% discount.** If you have questions about TPI training please contact: [training@tpi.org.uk](mailto:training@tpi.org.uk)

*All courses online unless stated otherwise.*





## RESIDENTIAL LEASEHOLD COURSES

### TC1: Introduction To Residential Property Management

**Trainers:**

**Annie MacGrandles – April 10th/11th & September 16th/17th**

**Jackie Dickens – May 29th/30th**

**Angela Wheeler – June 25th/26th**

**Anna Mercer – 9th/10th July & 8th/9th October**

A one-day interactive training course for those new to residential leasehold property management. It will provide an overview of the essential knowledge and processes required to effectively manage a leasehold block.

**BOOK NOW**



**Spring/Summer Dates**

10th/11th April 9:30am to 12:30pm

29th/30th May 9:30am to 12:30pm

25th/26th June 9:30am to 12:30pm

9th/10th July 9:30am to 12:30pm

16th/17th September 9:30am to 12:30pm

8th/9th October 9:30am to 12:30pm

---

### TC59: Managing Your First Portfolio – Legal Workshop

**Trainer: Cassandra Zanelli – PMLS**

Being a property manager is a demanding job; on any given day you can be required to demonstrate a variety of skills and knowledge. In this interactive legal workshop, we'll explore some of the common legal challenges that you might face and how to deal with them. This workshop will be based around a fictional block and a copy of its specimen lease and Articles of Association will be provided to all delegates for 'pre-reading'.

**Spring/Summer Date – Date TBC**

---

### TC69: Pools and Gyms in Residential Blocks

**Trainer: Rob Clarke – Motiv8**

A 3-hours webinar in best practice of the management and maintenance of leisure facilities in residential blocks which will give property managers and organisations an understanding of current best practice when managing blocks with gyms, swimming pools and other leisure facilities.

**Spring/Summer Date – Date TBC**

---

### TC105: Complaints Handling

**Trainer: Lesley Horton – Deputy Ombudsman TPO**

The property business is a people business, and good business means you will deal with a range of people. Inevitably some of those people will be dissatisfied and will make complaints.

Dealing with complaints effectively is a key business skill that often gets overlooked. If complaints are poorly handled, complainants become more disgruntled – taking up valuable time and resources of organisations. An effective complaints process aims to deal with complaints quickly and efficiently, identifying root causes and taking effective action to win back the confidence of the complainant.

The aim of this course is to help you and your team understand how best to deal with complaints to repair the relationship between your organisation and the complainant, so that great customer relations can be built and maintained.

**BOOK NOW**



**Spring/Summer Date**

8th July – 10am to 12:30pm

## RESIDENTIAL LEASEHOLD COURSES

### TC88: Are You A Property Manager With Party Wall Headaches? – Half Day Course

**Trainers: Cassandra Zanelli – PMLS / Abbie Reid – Earl Kendrick**

Since it came into force, the Party Wall Act has caused some headaches for property managers. Whether you're planning to undertake works or are on the receiving end of a Party Wall Notice, property managers need to understand the implications, timescales, and obligations. This interactive half-day course is designed to equip property managers with the knowledge and confidence they need to deal with Party Wall matters.

**BOOK NOW**  **Spring/Summer Date**  
22nd May – 9:30am to 12:30pm

---

### TC114: An Introduction to Being an RMC/RTM Director

**Trainers: Shabnam Ali-Khan (Partner and Head of Enfranchisement at Russel Cooke) / Alan Walker (RMC Director with 20 years' experience and former member of ARMA's Regulatory Panel)**

If you are a Director of a Residents' Management Company (RMC) or Right to Manage Company (RTM), or thinking of becoming a director, this course is for you.

RMCs/RTMs are companies which own and run blocks of flats. Each flat owner is typically a member or shareholder in the RMC and members are appointed from amongst their number to become Directors. The RMCs are then run by these Directors.

The duties of the company towards each Leaseholder are set out in the Leases for each flat. There is a mix of contractual duties, such as repairs, maintenance, insurance, and service charge accounting, and statutory duties, including setting reasonable levels of service charges and consulting on major works.

The aim of this course is to help you understand the different elements involved in being a director and develop how you carry out the role.

For further information and to book your place please email [training@tpi.org.uk](mailto:training@tpi.org.uk)

**Spring/Summer Date**  
8th & 9th July – Wimbledon – In Person Course

---

### TC82: Insurance

**Trainer: Rob Mayo (Insurety)**

The Introduction to Insurance course is designed to provide property management staff with a sound knowledge of the insurance industry within the residential leasehold sector. The course will provide useful information to enable your staff to provide knowledge-based advice to clients in line with UK regulatory standards.

**Spring/Summer Date – Date TBC**

---

### TC117: An Introduction To Leasehold For Letting Agents

**Trainer: Matthew Hearsum – JMW Solicitors**

There are an estimated 4.98 million leasehold dwellings in England and Wales, with leasehold flats making up 70% of the rental sector. A good understanding of the leasehold system is therefore essential for any lettings agent.

The aim of this course is to equip letting agents with a solid understanding of what a leasehold is, the common pitfalls for letting agents and their clients, and how to avoid them.

**BOOK NOW**  **Spring/Summer Date**  
7th May – 9:30am to 12:00pm

---



## RESIDENTIAL LEASEHOLD COURSES

### **W16 – Electrical Vehicle Charging Systems – A guide from enquiry, to installation, to commission**

**Trainer: Alan Draper – EV Solutions Group**

This training course explains the steps a property manager must consider progressing initial leaseholder enquiries right through to installation and commissioning of a full electric vehicle charging system.

The objective is to arm the property manager with sufficient knowledge of electric vehicle charging in communal environments to be able to:

- Field enquiries from leaseholders knowledgeably.
- Implement a procedure to qualify these enquiries and respond appropriately.
- To understand the processes, obstacles and risk factors associated with successfully implementing a communal electric vehicle charging system.

**BOOK NOW**  **Spring/Summer Date**  
18th April – 1pm to 2pm

---



## LEGAL

### TC27: Section 20

**Trainer: Jackie Dickens – Housing Network**

A one-day practical workshop covering the requirements and procedures of Section 20 (Qualifying Works and Qualifying Long-term Agreements), dispensation, OJEU Public Notices, and the growing body of case law.

**BOOK NOW**



**Spring/Summer Date**

15th and 16th April – 9:30am to 12:30pm

For additional dates email: [training@tpi.org.uk](mailto:training@tpi.org.uk)

---

### TC39: Reading Leases

**Trainers: Richard Bagwell – Stephens Scown / Barnaby Hope – Selborne Chambers**

A 6-hour course being run over 2 consecutive days (3-hours per day) where you will be learning to read leases constructively and understanding the practical application of the principles.

#### Content

This course will aim to cover:

- Who are the parties, how many parties are there
- Who is the client for ground rent, for service charges
- The demise, what is it
- Windows whose responsibility
- External decorations, internal decorations
- Forced entry: the client's rights
- Interest on late payment can it be levied
- Service charges to be treated as rent the implications
- Reserve funds allowable or not
- Period of grace for payment
- Mutual enforceability
- Indemnity required for Landlords enforcement in leaseholder disputes
- Landlords consent to assign or sub-let
- Case studies on what can go wrong
- Breakout interactive sessions

**BOOK NOW**



**Spring/Summer Date**

5th and 6th June – 9:30am to 12:30pm

---

### TC100: Company Law Basics for Management Companies

**Trainer: Cassandra Zanelli – PMLS**

Residents' Management Companies and RTM companies are subject to the same rules and regulations as all other limited companies. With corporate-based challenges from members on the increase, it is important that managing agents are familiar with company law basics. At the request of members, TPI has designed an interactive workshop focusing on the fundamentals of company law for management companies and troubleshooting some of the most common issues and challenges that managing agents face.

**Spring/Summer Date/s – Dates TBC**

---

## LEGAL

### TC102: Company Directors and Secretarial Duties and Responsibilities

**Trainer: Cassandra Zanelli – PMLS**

Residents' Management Companies and RTM companies are subject to the same rules and regulations as all other limited companies in England and Wales. This online training course highlights the key responsibilities and duties of Company Secretaries and Directors in relation to RMCs and RTM companies.

**BOOK NOW**  **Spring/Summer Date**  
22nd and 23rd April – 9:30am to 12:30pm

---

### TC103: Property Transfers – Implications for Property Managers

**Trainer: Cassandra Zanelli – PMLS**

Leasehold properties change hands on a regular basis. During the life of a lease, the leasehold interest is likely to be sold, transferred or otherwise disposed of. The lease will set out the requirements that outgoing (and incoming) lessees need to adhere to.

**In this course, we'll cover:**

- Identifying the responsibilities of the conveyancer
- Locating and interpreting the specific lease covenants relating to transfers of property, identifying the actions required by the relevant parties (e.g. property managers, conveyancers, leaseholders, etc.), including identifying the requirements for/compliance with:
  - Licences to assign
  - Deeds of Covenant
  - Certificates to satisfy restrictions at the Land Registry
- Completing LPE1 and LPE2 documents
- Notices of transfer and/or charge
- Stock transfer forms and issuing new share certificates (including dealing with lost certificates)
- Ensure all charges due are accounted for and paid to the point of transfer (including any remedial action if an account is not cleared)
- Dealing with possible year-end deficits/credits
- Identifying the key elements of effective welcome correspondence to new leaseholders
- RTM companies: what additional steps need to be taken

**Spring/Summer Date – Date TBC**

---

### W9: Dealing With Property Transfers

**Trainer: Cassandra Zanelli – PMLS**

During the life of a lease, the leasehold interest is likely to be sold, transferred or otherwise disposed of. The lease will set out the requirements that outgoing (and incoming) lessees need to adhere to.

In this one-hour webinar we'll explore the typical requirements found in leases and consider how managing agents should approach and enforce compliance with those requirements.

**Spring/Summer Date – Date TBC**

---



## LEGAL

### **W2: Leasehold Assignments – Who’s Liable for the Arrears?**

**Trainer: Cassandra Zanelli – PMLS**

Leasehold properties change hands on a regular basis. If there are service charges which haven’t been settled, what happens to those arrears on any sale, transfer, or disposition? Who should be pursued: the outgoing leaseholder or the incoming one? And what procedure can (and should) be followed? In this webinar, we’ll explore the practicalities of dealing with arrears of service charges when leasehold properties are assigned.

**Spring/Summer Date – Date TBC**

---

### **W14: Deeds of Variations: A Practical Guide for Property Managers**

**Trainer: Georgia Ball – PMLS**

Are you a property manager facing an increased number of requests for deeds of variation?

In this session, we’ll explore the reasons behind the requests, together a discussion around the common types of requests for variation sought by both leaseholders and owners of freehold properties, including the increased demand for mortgage protection clauses.

We’ll consider steps involved in varying leases (and transfers), and an overview of the process involved from the point of view of managing agents. We’ll also consider the frequent requests made to cancel, add and/or amend restrictions.

**BOOK NOW**  **Spring/Summer Date**  
13th June – 1pm to 2pm

---

### **W11: Dealing with Section 20b – “The 18-Month Rule”**

**Trainer: Cassandra Zanelli – PMLS**

There is a raft of contractual and statutory restrictions on the recovery of service charges, and failures to comply can result in lessees withholding payment of service charges. In some cases, the effects are suspensory, and failures can be corrected. In other cases, failures are fatal to the recovery of those service charges. Failing to comply with Section 20B (or the so-called 18-month rule) can result in stale (and unrecoverable) service charges; something all managing agents want to avoid.

In this webinar, we’ll explore the 18-month rule in some detail and look at what it means for managing agents in practice. We’ll consider the latest case law on this topic and offer some practical guidance for agents to try and avoid stale service charges.

**BOOK NOW**  **Spring/Summer Date**  
12th June – 1pm to 2pm

---



## HEALTH AND SAFETY / FIRE SAFETY

### **TC55: Introduction to Health and Safety for Residential Property Managers**

**Trainer: Shaun Lundy – Tetra**

A one-day course designed to introduce new entrants to the sector to the minimum Health and Safety knowledge essential to their career path. This course is not intending to turn beginners or new on-site staff into Fire Safety Risk Assessors, CDM experts, etc. merely to furnish them with the awareness to perform the day job safely and give comfort to their employers.

**What the course covers:**

- Health & Safety law and the requirements for risk assessments
- Understanding the various types of risk assessment required in residential property
- Hazards associated with residential property, including fire, asbestos, legionella, work at height, electricity and hazardous substances

**Spring/Summer Date – Date TBC**

---

### **TC66: Introduction To Fire Safety for Residential Property Managers**

**Trainer: Shaun Lundy – Tetra**

A 6-hour course being run over 2 consecutive days (3-hours per day). This course is provided for block managers looking to learn the basics of fire safety for residential buildings. It gives basic information for managing the fire risks of common parts of blocks of flats and delves into the essential grounding of the Regulatory Reform (Fire Safety) Order 2005. At the end of this course, you will understand who is responsible for what and why in terms of fire safety and will have a basic knowledge of the changes happening in this all-important area of block management.

**This course covers:**

- Fire Safety law and the requirements for fire risk assessments.
- Understanding a fire risk assessment.
- Requirements and implementation of systems to manage fire safety in residential buildings.
- Legal issues and enforcement of fire safety.

**The course is not designed to enable you to:**

- Provide competent advice or health and safety assistance as required in legislation.
- Undertake a detailed fire risk assessment as required in legislation.

**Spring/Summer Date – Date TBC**

---





## HEALTH AND SAFETY / FIRE SAFETY

### TC80: Advanced H&S For Residential Property Managers

**Trainers: M. Snelling / C. Zanelli**

An advanced one-day course for directors and senior managers who are responsible for undertaking the management of health and safety risk within their own organisation and on behalf of their clients to ensure that they comply with current health and safety law.

**What the course covers:**

- The broad requirements of the Health and Safety at Work Act etc. 1974 and an overview of the key health and safety regulations that will affect a managing agent.
- The steps a managing agent needs to take to manage health and safety risk within their own organisation
- The advice that a managing agent should provide to their client on their duties under health and safety law
- What a managing agent must and should do to comply with health and safety law when managing properties and how to limit their exposure when writing a Management Agreement
- The required elements of a compliance system to manage health and safety in residential blocks of flats
- The requirements and competency standards for anybody a managing agent must appoint to advise on or manage health and safety and
- The risks and the penalties associated with failure to comply with health and safety law.

**BOOK NOW**



**Spring/Summer Dates**

24th and 25th June – 9:30am to 12:30pm

---

### TC81: Lift Maintenance

**Trainer: llecs**

A half-day course, which will introduce managing agents and property managers to lifts, lift maintenance and their responsibilities under legislation. Participants will gain an understanding of how a lift functions, lift maintenance management, applicable codes and standards and how to plan for when a lift reaches the end of its service life.

**BOOK NOW**



**Spring/Summer Dates**

10th June – 9:30am to 12:30pm

27th November – 9:30am to 12:30pm

---

## HEALTH AND SAFETY / FIRE SAFETY

### TC90: Fire Safety For RMC/RTMs

**Trainer: Shaun Lundy – Tetra**

A one-day course for directors of Residents' Management Companies [RMC] and Right to Manage [RTM] Companies who have responsibility for fire safety management in residential blocks of flats.

The course covers fire safety management in residential blocks of flats. For Directors of high-rise buildings there will be a separate half-day course covering the particular requirements for managing fire safety in high-rise residential blocks of flats. To attend that course you must have previously completed this course.

**This course covers:**

- Directors' duties, responsibilities and liability under current fire safety legislation
- The broad requirements of current fire safety legislation including the Regulatory Reform (Fire Safety) Order 2005, the Building Regulations Part B Fire Safety, and the fire safety requirements of the Housing Act 2004
- The required elements of a compliance system to manage fire safety in residential blocks of flats
- Working with a Managing Agent to manage fire safety, and
- The law relating to flat front doors and the duty to maintain them
- The various leasehold and legal tools that can be used to enforce leaseholder fire safety compliance.

**Spring/Summer Date – Date TBC**

---

### TC108: Introduction to the Building Safety Act

**Trainer: Shaun Lundy – Tetra**

This course delivers guidance on managing buildings in scope under the Building Safety Act 2022. Through interactive and engaging contents participants will gain confidence in delivering positive building safety outcomes in their areas of responsibilities.

**Spring/Summer Date – Date TBC**

---

### TC110: Leaseholder Protections and Landlord's Certificates and Leaseholder Deeds of Certificate

**Trainer: Cassandra Zanelli – PMLS**

A half day course exploring the leaseholder protections under the Building Safety Act

The course will cover:

1. Relevant buildings and the exclusions
2. Qualifying leases at the qualifying time
3. Relevant defects and relevant works
4. Associated companies
5. The statutory waterfall under schedule 8
6. Landlord's certificates
7. Leaseholder deeds of certificate

We will also explore the changes to the certificates regime introduced under the Building Safety (Leaseholder Protections etc) (England) (Amendment) Regulations 2023

**BOOK NOW**  **Spring/Summer Dates**  
17th April – 9:30am to 12:30pm  
10th July – 9:30am to 12:30pm

---



## HEALTH AND SAFETY / FIRE SAFETY

### TC112: Building Safety Case Reports and Managing Agents

**Trainer: David Hills – ARK Workplace Risk**

The introduction of the Building Safety Act 2022 introduces new responsibilities and accountabilities on owners and managers of high-rise residential properties. Understanding who is accountable and what is needed is essential for owners and managers alike in order to stay ahead of the game and understand what it is going to take to ensure compliance.

A Building Safety Case report has been described by the BSR as one of the most important new documents that will be needed to be developed in the new building safety regime and requires the right levels of competence in not only fire safety but also structural safety in order to develop them.

The aim of this course is to help you, your team and your clients understand who has accountability for the development of a Building Safety Case Report but also understand what is required, what support can be offered to AP/PAPs and how best to manage building safety in the long term.

**BOOK NOW**  **Spring/Summer Dates**  
24th April 9:30am to 12:30pm  
26th June 9:30am to 12:30pm

### TC116: Resident Engagement Strategies

**Trainer: David Hills – ARK Workplace Risk**

The introduction of the Building Safety Act 2022 introduces new responsibilities and accountabilities on owners of high-rise residential properties, with property managers at the heart of helping to deliver and support the new regime on behalf of their clients. This new regime aims to engender a change in culture within residential property ownership and management with greater transparency and engagement at the heart of this new regime. Understanding who is accountable and what is needed is essential for owners and managers alike to stay ahead of the game and understand what it is going to take to ensure compliance.

The aim of this course is to help you, your team and your clients understand who has accountability for the development of a Resident Engagement Strategy but also understand the importance of capturing and understanding the demographics, needs and preferences of the residents, what a strategy must include and what support can be offered to AP/PAPs and how best to manage resident engagement in the long term.

**BOOK NOW**  **Spring/Summer Dates**  
30th April – 1pm to 4pm  
19th June – 9:30am to 12:30pm

### W12: Flat Front Doors (Conducting Basic Fire Door Checks)

**Trainer: Sharon Mason – Tetra**

This training course delivers instruction on how to conduct basic fire door checks under Regulation 10 of the Fire Safety (England) Regulations 2022.

It will aim to enable those with the responsibility for conducting routine fire door checks to appreciate the purpose and role of a fire door and how to identify common faults in fire doors for remediation.

**BOOK NOW**  **Spring/Summer Dates**  
23rd April – 2pm to 4pm  
22nd May – 2pm to 4pm  
19th June – 2pm to 4pm



## HEALTH AND SAFETY / FIRE SAFETY

### **TC115: Building Safety Masterclass – Two Day In-Person Workshop**

**Trainers: Cassandra Zanelli – PMLS / Mark Snelling – TPI’s H&S Consultant**

This March The Property Institute is running a two day in person Building and Fire Safety Masterclass at their Wimbledon office. Run by Cassandra Zanelli of PMLS and TPI’s H&S consultant Mark Snelling this course will provide an opportunity for anyone who hold responsibility for their firm’s compliance with the BSA and associated legislation to get a comprehensive run down of all parts of the legislation applicable to managing agents with reference to case studies, template documents and any pending secondary legislation, as well as extensive Q&A. A buffet breakfast and lunch will be provided both days.

#### **Spring/Summer Date**

9th and 10th July

For more information and to book your place email: [training@tpi.org.uk](mailto:training@tpi.org.uk)

---



## HUMAN RESOURCES

### TC83: Developing Resilience

**Trainer: Shelley Jacobs**

The speed of change in business today, especially in property management, can be very overwhelming. We are constantly bombarded with new challenges, new information, new technologies, new threats, and new opportunities alongside the ever-increasing expectations of leaseholders and clients. All of which are taking their toll on our employees as they struggle to endure and survive the resulting high levels of stress, and in turn have a serious impact on businesses through:

This practical and highly engaging 7.5-hour course being run over 3 consecutive days (2.5-hours per day) provides delegates with a range of tools and techniques to develop and maintain their own resilience, providing significant benefits to mental, physical and emotional well-being.

**BOOK NOW**  **Spring/Summer Date**  
11th to the 13th June – 10am to 12:30pm

---

### TC84: Developing Leadership

**Trainer: Shelley Jacobs**

This interactive and engaging 7.5-hour course being run over 3 consecutive days (2.5-hours per day – with 30 minutes each day for questions), covers practical solutions to today's leadership challenges and the resources to develop resilient, engaged and trusting teams.

In a sector rife with high employee turnover, managing people in today's complex world of work, especially in property management, has reached crisis point. High employee stress levels, lack of engagement and high levels of absenteeism require managers and leaders to significantly up their game in order to have the necessary skills to be able to deliver an excellent employee experience.

Managers/Leaders have the responsibility to create a healthy working environment, a positive culture, and have a shared responsibility for the future success of their business.

Their actions, behaviours and values have an enormous impact on the workplace, and the emotional well-being of their staff.

This course will help you navigate these challenges and provide real solutions to improve emotional wellbeing within your workforce, increase performance, decrease employee turnover, and increase employee engagement.

**BOOK NOW**  **Spring/Summer Date**  
2nd to 4th July – 9:30am to 12:30pm

---

## ACCOUNTING

### TC44: Introduction to Accounting for Service Charges

**Trainer: Lisa Warren – RMG**

A one-day interactive course walking through the financial year of a property. This course is aimed at individuals with less than 18 months' experience in the industry.

**BOOK NOW**



**Spring/Summer Dates**

20th and 21st May – 9:30am to 12:30pm

14th and 15th October – 9:30am to 12:30pm

---

### TC11: Guidance On Accounting for Service Charges

**Trainer: Lisa Warren – RMG**

A one-day interactive forum addressing best practice and legislative requirements at a senior level when accounting for service charges.

**BOOK NOW**



**Spring/Summer Dates**

17th and 18th June – 9:30am to 12:30pm

18th and 19th November – 9:30am to 12:30pm

---

### TC97: Counting The Cost – Reserve Fund Or Not To Reserve Fund?

**Trainers: Neil Maloney – MyHomeSurveyor / Lisa Warren – RMG**

This one-day practical workshop (2XThree hour sessions over two days) is intended to explore the liability for providing a reserve fund in residential management and the rules governing its accumulation and use.

**BOOK NOW**



**Spring/Summer Date**

29th and 30th April – 9:30am to 12:30pm

---

**The Property Institute** 

**The Property Institute**

Office Address:  
3rd Floor, 2–4 St George's Road,  
Wimbledon, London, SW19 4DP

Registered Address:  
20–22 Eversley Road, Bexhill-on-Sea, TN40 1HE

Telephone: 020 7978 2607  
Email: [info@tpi.org.uk](mailto:info@tpi.org.uk)  
[www.tpi.org.uk](http://www.tpi.org.uk)

Company Limited by Guarantee.  
England and Wales No. 13753239 | VAT Number: 406 608213

Designed by LTD Design Consultants

January 2024