Choosing our new managing agent

From the Board of 11 Point Pleasant RTM Company Limited • September 2026

Since the Right to Manage has been established, the RTM Company can now appoint a managing agent to replace NHG and to take over the day-to-day management of the block. This choice is now ours to make. We are the client: we appoint the most suitable managing agent, work closely with them to ensure that standards are met and our service charge is spent responsibly, and hold them accountable if they fall short.

Before inviting anyone to tender, we researched the managing agents operating in this part of London, drawing on feedback from residents here and from leaseholders at other buildings in the area, and narrowed the field to a shortlist of four. In June 2026 those four were invited to tender. Each was sent the same detailed set of questions covering cost, staffing, safety, technology, references and how they would handle real situations in this building, and all four visited for a walk round and inspection. We then undertook a detailed review of their submissions, the committee spoke with each firm and put further questions to them, and we carried out a deep analysis of roughly 1,060 published customer reviews across Trustpilot and Google going back to 2014.

The headline: all four firms would be a significant improvement on NHG. All four are members of The Property Institute, hold client money protection and carry at least £2m of professional indemnity insurance. Every one of them rates far higher with its own customers than NHG, whose published Trustpilot rating is 1.1 out of 5. This is a choice between four capable firms, not a search for the only acceptable one.

The Board and Committee have decided to appoint JCF Property Management. Several reasons: they gave us the most comprehensive answer to the tender, putting an indicative figure against every cost we asked about; they are twenty minutes away rather than fifty or seventy, and already manage four buildings near us; and they hold clients of 26, 20 and 18 years' standing. For a building that has struggled to get responses and site attendance, proximity and thoroughness matter. Their reviews are strong, and they answer complaints better than any of the four.

Annual managing agent fees

	JCF	Grace Miller	LBM	JFM	NHG
Management fee	£25,488	£37,200	£28,512	£25,488	£21,600
Company secretarial fee	£1,080	£1,020	£540	£600	–
Total	**£26,568**	**£38,220**	**£29,052**	**£26,088**	**£21,600**

The management fee, whilst important, is only a small proportion of what we spend. The service charge for this building has grown from under £100,000 a year to over £200,000, and the fee is a fraction of that. Three of the four bids sit within about £3,000 of each other, so the fee is not what separates them. What matters far more is who controls the rest: whether contracts are tendered properly, whether the reserve fund is planned rather than guessed at, and whether we are told what our money was spent on. There is also a cost that never shows up on a service charge statement: the hours leaseholders spend chasing repairs and unanswered emails. A better agent should give most of that time back. In the committee's view, paying somewhat more for that is the better use of the money.

The four firms

JCF Property Management COMMITTEE'S RECOMMENDATION

Putney SW15 • trading since 1985 • 195 buildings • ~20 min away • ~£26,600 a year including VAT

Strong all-round, and the firm that came out ahead on most of what we asked about. They were the only firm to answer every question in the tender with usable figures, they are much the closest to the building, and they hold clients of 26, 20 and 18 years' standing, the longest relationships of the four.

That pricing covered planned maintenance, cleaning at three service levels, insurance and the reserve fund, and they gave us a month-by-month plan for taking over from NHG. Their office is in Putney, around twenty minutes away, they already manage four buildings near us, and they have a local contractor bench covering fire safety, lifts and decorating. They are also the only firm whose customer reviews show hands-on experience with the type of smoke ventilation system this building relies on.

JCF joined the Fexco Property Services group in September 2025. They raised this with us in our early conversations, and we have since discussed it with both companies. The day-to-day operation, the local team and the office are unchanged, and both describe the group connection as a positive one that gives JCF more leverage with suppliers.

What the reviews show. Google 3.7 from 41 reviews. **Trustpilot 4.7** from 218. The Trustpilot record is large, runs back years, shows no sign of a review-gathering push, and their complaint handling is the best of the four. The Google rating is the lowest of the four, on a much smaller sample, and around half the Trustpilot base is lettings and conveyancing work rather than block management. The complaints that do exist are about communication and cost rather than competence. We score the review evidence 7.5 out of 10, second of the four.

In short: The most thorough tender response, by far the closest to us, and the longest client relationships.

Grace Miller & Co

New Malden KT3 • family firm since 2000 • 118 blocks • ~50 min away • ~£38,200 a year including VAT

An excellent boutique firm, and in many ways the closest to how we would like this building run. They have the cleanest complaint record of the four, exceptional staff retention with around two thirds of their people having been there five years or more, no tribunal history at all, and an “Outstanding” audit rating from The Property Institute, which only around four firms in the country achieve each year.

The obstacle is cost. At roughly £38,200 a year they are about 40% more expensive than the others, and their fee is quoted as a range rather than a firm price. The bigger gap is in major works: they charge 12.5% of the contract to run the work in-house, or 4% alongside an independent surveyor, with half falling due at tender stage whether the work proceeds or not. On a building facing AOV, lift and decoration work in the next few years, that is where the real cost difference lies, not in the annual fee.

Two other points. At 72 flats we would be one of their larger instructions: most of their 118 blocks are between 20 and 50 units, although they do manage several bigger ones. And their reporting portal was not as strong as others we saw, reflecting a client base of smaller buildings where leaseholders tend to call or email the manager directly.

What the reviews show. Google 4.8 from 64 reviews. **Trustpilot 5.0** from 2, a sample too small to mean anything either way. The Google record is the cleanest we found anywhere and rests on more reviews than JCF has: three negatives in nine years, none in the last twelve months, no building appearing twice, every one answered and two answered personally by a director. Around a third of those reviews relate to their estate agency and lettings work rather than block management. We score the review evidence 8.0 out of 10, the best of the four.

In short: The best reviewed of the four, but considerably more expensive than the other firms.

London Block Management

Islington N1 • established 2009 • ~200 blocks • ~50 min away • ~£29,100 a year including VAT

A genuinely strong option with the best compliance and building safety record of the four: an in-house health and safety team of four, around thirty cladding projects delivered, and successful warranty claims against developers producing six-figure payouts for their clients. Their answer on how they would handle a smoke ventilation failure was the most technically precise written answer of the four.

They produced a good tender and turned it round quickly, they have the cheapest major works rate of the four, and their contract terms are the cleanest: rolling, three months' notice on either side, no exit fees. The main drawback is location. Their office is in Islington, around fifty minutes away, and they were the only firm that would not tell us how many buildings our manager would be looking after.

What the reviews show. Google 4.0 from 200 reviews. **Trustpilot 4.3** from 53. The picture is genuinely improving from a poor starting point: complaints have fallen year on year, from nine in 2024 to five in 2025 to two so far in 2026, the best trend of the four. Set against that, forty per cent of their lifetime Trustpilot reviews are one star, and part of the recent Trustpilot score comes from a drive to collect reviews in early 2026 rather than from ordinary feedback. We score the review evidence 5.0 out of 10.

In short: Excellent on safety and compliance, and good value, but not local.

JFM Block & Estate Management

Harrow HA1 • operating since 2015 • 124 estates • ~1 hr 10 away • ~£26,100 a year including VAT

JFM interviewed well and they are the cheapest bid, with the most flexible contract terms of the four, the highest insurance cover, and the only firm to name the exact team who would look after us. Our first impression of their reviews was very positive.

That impression did not survive a closer look, for the reasons set out below. They also took the longest of the four to respond to the tender, and left a number of questions unanswered, including most of the pricing we asked for.

What the reviews show. Google 4.4 from 302 reviews. **Trustpilot 4.4** from 280. The highest volume of the four, and on the face of it a strong score. Once the hundred or so reviews praising the fire door inspector are set aside, along with around forty from conveyancing work and twenty from suppliers, roughly a quarter of what remains from the last eighteen months is negative, and that share is rising rather than falling. Several come from the same small number of buildings. We score the review evidence 3.0 out of 10, the lowest of the four.

In short: Well priced and flexible, but the least complete submission of the four, and their reviews do not stand up as well as they first appear.

Appendix

Tender responses side by side

Every question we asked the four firms, and what each of them answered, in their own words. Firms appear in the same order as the summary. Where a firm did not answer a question at all, the row is shown in red.

This is the raw record. It contains no comment, scoring or comparison, so you can read what was submitted and form your own view.

Tender responses side by side

Every question asked, and what each firm answered

Prepared for the Board

JCF	JCF Property Management	Grace Miller	Grace Miller & Co.
LBM	London Block Management	JFM	JFM Block & Estate Management

NONE	Where a firm did not answer a question at all, the row is shown in red and marked NO RESPONSE PROVIDED.

How to read this document

Questions appear in the order they were asked in the Invitation to Tender: Section 4.1, the financial proposal, followed by the Section 4.2 questionnaire, A to G. Each question is shown in full, followed by each firm's answer. Firms appear in the same order throughout. Answers are set out in each firm's own terms and are condensed rather than quoted verbatim; figures, commitments and named systems are reproduced exactly as submitted. Where a firm answered by cross-referring to an attachment or an appendix, that is recorded as given. This document contains no comment, scoring or comparison.

Questions answered

	JCF	Grace Miller	LBM	JFM
Section 4.1, financial proposal (10 items)	10 of 10	10 of 10	10 of 10	3 of 10
Section 4.2, questionnaire A to G (19 items)	19 of 19	19 of 19	19 of 19	18 of 19
Total answered	**29 of 29**	**29 of 29**	**29 of 29**	**21 of 29**

A question is counted as answered where the firm provided a response of any kind, including a response declining to give a figure at this stage. JFM did not respond to Section 4.1 items (b) to (h) or to questionnaire item F2.

Section 4.1, financial proposal and indicative budget

4.1 (a) Annual management fee

State your flat rate per annum. Itemise the day-to-day services covered by this baseline rate and provide your standard tariff sheet for any ad-hoc professional services.

JCF	£295 + VAT per unit, £21,240 + VAT per annum. Scope itemised under four headings. Property management: dedicated Property Manager, dedicated Property Administrator support, regular site inspections, attendance at quarterly Board meetings and AGMs, resident and Director liaison, contractor management and supervision, defect management, resident communications, management of service contracts, procurement of routine works and management of reactive maintenance. Compliance management: coordination of all statutory compliance, FRA actions, lift servicing and LOLER, legionella, EICR, health and safety monitoring, contractor compliance and compliance records. Financial management: annual budgets, service charge collection, arrears management, supplier invoice processing, bank reconciliations, financial reporting, quarterly budget monitoring, reserve fund management and year-end accounting coordination. Governance and administration: resident portal access, document management, Director support, management reports, insurance administration and day-to-day RTM administration support. Ad-hoc tariff (excluding VAT): LPE1 / management pack £300; solicitor enquiries on re-mortgage £200; additional enquiries post LPE1 £100; notice of transfer or assignment £75; notice of charge £75; consent to let £100; licence to assign £100; certificate of compliance £100; deed of covenant £100; pet licence £100; share or membership certificate £120; letter of consent for alteration £350 + VAT excluding solicitor and surveyor fees; licence to alter £100 + VAT plus solicitor and surveyor fees. Hourly rates: administration manager £85, property manager £100, associate director or senior property manager £150, director £200.
Grace Miller	Around £31,000 plus VAT per annum. Before confirming a final figure, Grace Miller would welcome the opportunity of reviewing certain estate documents already requested and discussing further. The appointment would include full day-to-day management of the building fabric and common areas, together with service charge collection, accounting and all associated administrative services required for the effective operation of the development, as set out in Appendix II of the attached management agreement template. Ad-hoc services and their charges are listed in Appendix III of that agreement.
LBM	£330 plus VAT per unit per annum, equating to £23,760 plus VAT per annum for the building on the basis of 72 units. Day-to-day services are covered in Section 3, pages 4 to 11, of the attached template management agreement. Potential additional fees, many of which would not apply, are detailed in Schedule 3, pages 21 to 25, which includes Leasehold Property Enquiries £520, Freehold Management Enquiries £450, pre-mortgage enquiries £250, updated enquiries £150 or £250 depending on who compiled the original, and receipting notices of transfer, assignment or charge at £80 each. Time-based additional services are charged by the hour in 15 minute increments.
JFM	£295 + VAT per unit per annum (£354 including VAT), £21,240 + VAT per annum in total (£25,488 including VAT), on the basis of 72 units. The fee covers the core services laid out in the management agreement, expressed as a flat fee per unit and then split across the applicable budget schedules. The company secretarial fee is quoted separately at £500 + VAT per annum.

4.1 (b) Setup and handover fees

Clarify if you charge a one-off setup fee to execute the handover from NHG. If no separate fee is charged, explicitly confirm if onboarding hours are absorbed into your standard fee and if there are any limitations.

JCF	No separate mobilisation or setup fee for the transfer from Notting Hill Genesis. Onboarding and mobilisation are absorbed within the annual management fee and include liaison with NHG and the RTM Company, transfer and review of property records and management documentation, transfer of financial information, service charge accounts and reserve fund information, contractor review and novation where appropriate, compliance document review, resident communication and introduction, resident portal setup, establishment of reporting and communication procedures, and an initial site inspection and mobilisation review meeting. The proposal assumes reasonable cooperation from the outgoing agent and that transfer information is provided in an orderly and complete manner. Where significant historic issues, missing records, litigation, tribunal matters, complex defects or substantial remedial work are identified during mobilisation and require material additional resource beyond a standard transfer, these would be discussed with the RTM Company in advance and any additional support agreed before proceeding. On the information provided, JCF does not currently anticipate any such limitations and has made no allowance for additional mobilisation charges.
Grace Miller	No set-up fee is charged, but Grace Miller would recommend an onboarding audit charged at £2,000 plus VAT. This would include: a rapid review of compliance with advice on immediate priorities; onboarding existing contractors and suppliers and mobilising new ones; a report on the building summarising landlord and RMC responsibilities, condition and wants of repair; an overview of contracts and maintenance agreements; an insurance review; financials covering income and expenditure and the adequacy of the reserve fund position; any known breaches of lease or disputes; a risk-based action plan worked up and agreed with the Directors; and commissioning of any reports required, such as fire risk assessment, health and safety risk assessment, asbestos survey and planned maintenance plan.
LBM	No handover or setup fees are charged. Onboarding hours are absorbed into the standard fee without limitation.
JFM	**NO RESPONSE PROVIDED**

4.1 (c) Initial building surveys and technical audits

Detail any upfront costs for independent building surveys or specialist M&E engineering audits required prior to or during takeover. State whether these are a mandatory condition of contract signature, how they are priced, and if they are conducted by internal staff or a third party.

JCF	The RTM Company is not required to commission any mandatory building surveys, technical audits or M&E inspections as a condition of contract signature or mobilisation. As part of onboarding, the Property Manager undertakes an initial site inspection and reviews all available compliance documentation, maintenance records, warranties, servicing contracts, surveys and asset information provided by NHG and the RTM Company. Where gaps are identified, or where existing documentation indicates potential concerns about the condition, operation or compliance of the building and its services, further specialist investigations may be recommended: building fabric condition surveys, M&E asset surveys, lifecycle and PPM surveys, fire safety surveys, drainage investigations, structural engineering inspections, CCTV drainage surveys and specialist lift condition surveys. Any such surveys would only be commissioned following consultation with and approval from the RTM Company, and would typically be undertaken by independent third-party consultants or suitably qualified specialists to ensure impartiality and technical competence, procured competitively where appropriate. No allowance for such costs has been included in the fee proposal.
Grace Miller	Refers to the onboarding audit set out under Setup and Handover Fees above.
LBM	An internal audit of the financial position, all contracts and the health and safety position is conducted as LBM takes over the management. There is no additional charge for this. No other surveys or similar are required.
JFM	**NO RESPONSE PROVIDED**

4.1 (d) PPM and statutory compliance

Provide an indicative annual cost to manage and maintain the core building systems and statutory compliance listed in Sections 3.2 and 3.3.

JCF	Indicative annual costs: lift maintenance and LOLER compliance £3,000 to £5,000; fire risk assessment and fire safety compliance £1,000 to £2,000; AOV smoke ventilation system £1,000 to £2,000; electric gate, access control and security infrastructure £1,500 to £3,000; CCTV maintenance and cloud recording £1,000 to £2,000; water hygiene, legionella and booster plant £2,000 to £4,000; drainage and rainwater sump pump maintenance £1,500 to £3,000; health and safety risk assessments £500 to £1,000; company secretarial and registered office £900 + VAT; directors and officers liability insurance £450 to £750; reactive maintenance provision £3,000 to £5,000. Indicative annual total £11,350 to £20,750 plus VAT where applicable. JCF would seek to retain existing specialist contractors where they are delivering good service levels and value for money. All compliance administration, contractor management, compliance tracking, record keeping, reporting and liaison with specialist contractors are included within the annual management fee and attract no additional management charge. Figures are indicative and would be refined following appointment.
Grace Miller	Included within management fee.
LBM	The costings for this and the next few items would not typically be included in a tender request, as any agent would be guessing at the answers without bringing contractors in to quote. All areas would be reviewed on handover and best value for money sought in everything. LBM does not charge commission on any of these items or any additional management fees.
JFM	**NO RESPONSE PROVIDED**

4.1 (e) Cleaning and grounds keeping tiers

Provide annual costings for three distinct service levels: Enhanced (proactive deep cleaning, manicured grounds), Standard (balanced baseline for a mid-rise block), and Essential (core hygiene and basic upkeep).

JCF	Based on the requirements in Section 3.4 and an understanding of the development as a 72-unit residential block with communal landscaped areas, underground parking, bin stores and communal circulation space: Essential £15,000 to £20,000; Standard £20,000 to £25,000; Enhanced £25,000 to £35,000. Figures are indicative only and subject to site inspection, contractor procurement and the final service specification agreed with the RTM Company.
Grace Miller	Grace Miller would be happy to provide costings but would need to arrange access for contractors to visit and assess the building in order to provide accurate costings.
LBM	LBM would need to bring contractors in to provide detailed quotes before being able to provide any meaningful response to this question.
JFM	**NO RESPONSE PROVIDED**

4.1 (f) Insurance and commissions

Provide an indicative annual premium basis for a building of this size, fully disclosing any broker commissions or administration fees.

JCF	Without sight of the claims history, any indicative premium is a range provided by JCF's broker. Initial discussions suggest around £20,000 per year would be the usual range for a building of this size in this location, not factoring in construction materials and other factors. Under the terms of the management agreement, JCF may receive up to 15% of the net premiums, excluding IPT, as a share of broker commission for the work performed in arranging and supporting insurance matters. If future regulatory changes prevent JCF from receiving or retaining commission, it may instead charge a fair, proportionate and transparent insurance administration fee, notified in advance, to cover the reasonable cost of carrying out insurance-related work.
Grace Miller	More information is needed in order to provide an indicative premium. Certain assumptions can be made regarding claims history and construction details, but it is very difficult to arrive at an indicative premium without any information on the declared value of the building.
LBM	LBM would be happy to obtain an indicative insurance premium and asks for the building's declared value and a rough idea of the claims history in order to do so. It states that it can virtually always lower the premium and obtain broader coverage than is already in place, and holds a large portfolio of insurance with Axa.
JFM	**NO RESPONSE PROVIDED**

4.1 (g) Project and major works (Section 20)

State your fee structure (percentage of contract value or fixed fee) for managing major capital expenditure and define the financial threshold at which this fee applies.

JCF	Administration of the Section 20 consultation process: minimum £550 + VAT per instance or 2.5% of the contract value, whichever is greater. Section 20 dispensation application: £550 + VAT per instance. Major works management: minimum £550 + VAT per instance or 2.5% of the contract value, whichever is greater. Where a specialist building surveyor, project manager, contract administrator or other professional consultant has not been engaged and JCF is required to undertake full project management responsibilities, a management fee of 10% of the contract value would apply. These fees would typically apply to projects where the qualifying contribution threshold under Section 20 of the Landlord and Tenant Act 1985 has been exceeded and formal consultation is required. Any fees would be discussed and agreed with the RTM Company prior to instruction.
Grace Miller	Two scenarios generally apply. Where Grace Miller supervises the work in-house, drawing up the specification, obtaining tenders, dealing with the Section 20 process if required and supervising the work when it happens, the charge is 12.5% of the contract sum plus VAT. Where the nature of the work is more technical and an independent surveyor, architect or other specialist is involved, the charge is 4% of the contract sum plus VAT for Grace Miller's involvement, dealing with the Section 20 process if required, liaising between surveyor, Board and residents, making stage payments and general contract administration.
LBM	2.5% plus VAT of the contract value above the Section 20 threshold for dealing with major works projects. LBM states that it gets very involved in major works projects, acting as the interface between tenants, leaseholders, the board, contractors and the surveyor, and would attend any pre-start meetings and the fortnightly site meetings so as to be up to speed on the project and able to answer questions.
JFM	**NO RESPONSE PROVIDED**

4.1 (h) Reserve fund and working capital

State your recommended annual service charge contribution to the reserve fund. Confirm if your company requires an initial client float or working capital, including the precise amount and terms.

JCF	Having reviewed the current service charge budget and reserve fund contribution levels, JCF would recommend maintaining an annual reserve fund contribution in the region of £15,000 to £20,000 per annum. This aligns broadly with the current contribution of approximately £17,500 and will assist in funding future replacement and major repair of the passenger lift, AOV system, door entry and access control, CCTV, electric gate, communal electrical infrastructure, internal and external decorations and general building fabric. Following appointment JCF would review the existing reserve balance, historic expenditure and anticipated lifecycle liabilities, centred on a CAPEX plan procured and drawn up by a qualified surveyor. JCF does not require a client float or working capital contribution to be paid to it as Managing Agent, and no minimum balance is contractually required. It recommends the RTM Company maintains sufficient cash reserves within the service charge account to meet routine operating expenditure and contractor payments.
Grace Miller	Grace Miller recommends the RTM Company consider having a planned maintenance programme prepared by an experienced building surveyor. This could then be used as a strategic roadmap for the estate's maintenance, ensuring the long-term preservation of the building and a transparent approach to service charge expenditure. It would set out the likely cost of each piece of work, which would in turn help inform reserve fund setting.
LBM	It is too early to determine a recommended annual contribution to the reserve fund. This would follow on from the planned maintenance position above and would also be a function of how much is currently held in the reserve fund and what funds might already be committed to existing projects.
JFM	**NO RESPONSE PROVIDED**

4.1 (i) Additional agent fees

List any other fixed fees, software licensing mark-ups, or optional premium services unique to your company, explicitly stating the commercial terms for each.

JCF	Refers to the earlier answers in the questionnaire together with Appendix 1 in relation to any additional fees.
Grace Miller	Refers to Appendix III of the attached Management Agreement.
LBM	Refers to Schedule 3, pages 21 to 25, of the attached draft management agreement. LBM does not charge software licensing mark-ups.
JFM	The Ark enhanced resident app is offered as an optional extra at £25 + VAT. The standard Re-Leased web portal and customer app are included within the management fee.

4.1 (j) Company secretarial and registered office

State the annual cost of company secretarial services and provision of a registered office address, and confirm what happens to corporate records if the RTM Company moves the service elsewhere.

JCF	£900 + VAT per annum for a development of 60 to 99 units, provided as an optional service through JCF Secretaries Ltd. This includes registered office provision, maintenance of statutory registers, preparation and filing of the annual confirmation statement, Companies House filings, officer appointment and resignation administration, liaison with accountants and auditors and maintenance of company records. Should the RTM Company subsequently appoint an alternative Company Secretary, all corporate records would be transferred promptly and without administration charges.
Grace Miller	£850 plus VAT to provide Company Secretary services to the RTM company.
LBM	Typically outsourced to a specialist firm who charge around £400 plus VAT per annum in total. All corporate records will be returned promptly at zero cost should the RTM Company choose to move this service.
JFM	£500 + VAT per annum (£600 including VAT). This covers the statutory administration of the company, for instance maintaining the share and membership register, filing company documents, dealing with directorship appointments and resignations, and calling official company meetings.

A. Company, accreditation and financial protection

A1 Firm profile and scale

How long has your company been in business, where is your head office, how long would it take the property manager to travel to 11 Point Pleasant, and how many direct employees do you currently have?

JCF	Operating since 1985, with over 40 years' experience managing residential blocks, estates and mixed-use developments across London and the South East. Head office at 322 Upper Richmond Road, London SW15 6TL, approximately 1.5 miles from 11 Point Pleasant, typically reached within 7 to 10 minutes by car and public transport. 26 staff across property management, accounting, administration, compliance and leadership functions.
Grace Miller	In business since 1 August 2000. The office is in New Malden, approximately 20 minutes from 11 Point Pleasant. 25 employees.
LBM	Established in 2009. The office is opposite Angel station in Islington, but LBM covers the whole of London. Employees are required to work three days per week from the office and also live all over London, so sites can be visited easily. 11 Point Pleasant is about 8 miles or 1 hour from the office. 43 employees in total, all based in the main office.
JFM	Operating since April 2015. Head office in Harrow on the Hill. The journey from head office to 11 Point Pleasant is approximately 1 hour and 12 minutes by car, with a similar journey time by public transport. 72 members of staff employed directly.

A2 Professional accreditations

State your professional accreditation and regulation: membership of The Property Institute (TPI) and/or RICS regulation; the approved redress scheme you belong to; and your ICO registration. Which Code of Practice do you operate to?

JCF	The Property Institute, with JCF and members of the management team maintaining professional membership; RICS regulated firm operating in accordance with RICS professional standards and guidance; ARLA Propertymark; Client Money Protection arrangements maintained. Member of The Property Ombudsman. Registered with the Information Commissioner's Office. Operates in accordance with the TPI Consumer Charter and Standards, the RICS Service Charge Residential Management Code (Third Edition), relevant provisions of the Landlord and Tenant Act 1985 and the Commonhold and Leasehold Reform Act 2002, and the Building Safety Act 2022 and associated regulations where applicable.
Grace Miller	Jonathan Miller is a Member of the Royal Institution of Chartered Surveyors, a Member of The Property Institute and a Member of ARLA Propertymark. Grace Miller & Co. has been a member of ARMA / TPI since 2002. Members of the Property Redress Scheme. Works in accordance with the RICS Service Charge Residential Management Code, 4th Edition. The proposal also states that Grace Miller is authorised and regulated by the Financial Conduct Authority for general insurance business, and that in its last audit it was rated Outstanding by ARMA / TPI.
LBM	Member of TPI; The Property Ombudsman redress scheme; ICO registration Z2352077; Financial Conduct Authority Appointed Representative (registration number 602508) of Clear Insurance Management Ltd, who are authorised and regulated by the FCA (registration number 307982), which means LBM can place insurance to the whole market and handle insurance claims through Clear, chosen as a partner for the value for money they provide clients and their claims handling service; British Safety Council.
JFM	Full member of The Property Institute and regulated by the Royal Institution of Chartered Surveyors. Member of The Property Ombudsman redress scheme and registered with the Information Commissioner's Office for data protection compliance. Operates in accordance with the RICS Service Charge Residential Management Code and follows relevant professional standards, guidance and best practice issued by RICS and TPI.

A3 Client money protection

Confirm your CMP scheme membership and provide your certificate. How is client money held? Are service charge and reserve funds held in separate, ring-fenced, designated client bank accounts?

JCF	JCF is a member of an approved Client Money Protection scheme and maintains appropriate protection arrangements. A copy of the current CMP certificate is included within the tender appendices. All client monies are held separately from JCF's own operational funds and are subject to financial controls, regular reconciliation and independent accounting oversight. Service charge and reserve fund monies are held in individual designated interest-bearing trust accounts established specifically for each development, established in the name of the client development, fully ring-fenced from other client monies, operated in accordance with the RICS Service Charge Residential Management Code and protected under JCF's CMP arrangements, with interest earned credited to the relevant development.
Grace Miller	All client funds are held in Section 42 compliant designated trust bank accounts. All client bank accounts are held with Barclays and each client has its own bank account or accounts specifically for that client's account.
LBM	CMP scheme membership number CMP004592, with a copy of the certificate attached. All client money is held in separate designated client accounts with no co-mingling of funds with those of any other building or LBM's own funds. Interest accrues to each individual client account.
JFM	JFM is regulated by RICS and, as part of that membership, clients benefit from RICS Client Money Protection arrangements. The Client Money Handling Procedure and Client Money Protection certificate are enclosed. All client funds are held in designated client bank accounts in the name of the client and are completely separate from JFM's operational funds. Service charge and reserve funds are held in ring-fenced trust accounts, ensuring full segregation in accordance with RICS requirements and industry best practice.

A4 Professional indemnity

State the level of your Professional Indemnity insurance cover.

JCF	£5,000,000 limit of indemnity, with a copy of the current certificate included within the tender appendices. JCF also maintains employers' liability insurance of £10,000,000 and public liability insurance of £5,000,000. Arrangements are reviewed regularly to ensure they remain appropriate for the size, complexity and risk profile of the developments under management.
Grace Miller	£2 million per claim, held with Zurich Insurance.
LBM	£5 million for any one claim, in place with Hiscox.
JFM	Up to £10 million.

B. Portfolio and suitability

B1 Portfolio fit

How many blocks or residential buildings do you currently manage, and what is the minimum, maximum and average unit size? Honestly evaluate where a 72-unit block like 11 Point Pleasant sits within your portfolio. Is it an operational outlier, or your team's bread and butter? Do you manage any other blocks in our area?

JCF	169 live property management appointments, 195 buildings, 4,174 residential units, 18 commercial units and 18 Higher-Risk Buildings. No minimum or maximum in terms of unit size. 72 units would very much be JCF's bread and butter, fitting well within the current portfolio demographic. Buildings managed in near proximity include Vista Apartments (28 units), Prospect Quay (86 units), Centre Square (101 units) and The Limes (55 units).
Grace Miller	118 blocks, the majority between 20 and 50 units. 11 Point Pleasant would not be an outlier but would fit in the top third of the portfolio. Grace Miller manages estates of 179, 132, 108 and 102 units, and another two of 68 and 69 units respectively.
LBM	Around 200 blocks of flats in total comprising about 8,000 units. Maximum size 510 units, minimum 10 units, average about 41 units. A 72-unit building sits quite comfortably within the portfolio and is a good sized building for LBM. The building type is also familiar: while LBM does not work directly for Berkeley Homes, it has several sites in its portfolio where Berkeley was the developer and has developed a professional relationship with them including at board level. LBM does not manage any other building in the immediate vicinity although it manages several others close by, and supplied a map of the surrounding area with pins showing other managed buildings.
JFM	124 separate estates. Largest instruction circa 1,100 units, described as an outlier; smallest full management instruction 20 units, part of the trainee portfolio. Average instruction size 84 units, with the vast majority of the portfolio falling between 50 and 150 units.

B2 Leaseholder governance experience

How many of your clients are leaseholder controlled (RTM companies or RMCs) rather than freeholder-instructed?

JCF	Over 80% of the portfolio consists of RMC and RTM clients.
Grace Miller	85% of the developments managed are leaseholder controlled.
LBM	Over 95% of clients are leaseholder-led companies, whether RMCs, RTMs or share of freehold companies. LBM works with only one medium-sized developer, for whom it manages four sites. Nearly every client is therefore similar to this set-up and started from a similar process.
JFM	At inception JFM worked exclusively with leaseholder-led clients (RMC, RTM and FHMC). It was only in 2019 that it accepted its first instruction from a freeholder, on the basis that they would engage proactively with the residents' association. Circa 80% of the portfolio still falls in the leaseholder-led categories.

C. The team managing our block

C1 Dedicated account structure

Set out the exact make-up of the team that would be personally responsible for our block: the dedicated Property Manager, their technical and administrative support, the back-office accounts team, and senior management oversight.

JCF	Refers to the organisation chart as at June 2026, included within the appendices. JCF's aim is always to match clients with the best possible member of staff available, and it would therefore propose to appoint the property manager following further discussions to ensure it can satisfy the needs of the Board, residents and the building with its approach.
Grace Miller	Each development has a dedicated property manager who would be the point of contact and would be readily available to deal with whatever issues arise and respond to queries from directors and residents. Property managers operate within dedicated teams, ensuring continuity of service at all times: if the assigned manager is unavailable, due to holiday or other circumstances, a team member with full knowledge of the development steps in to provide seamless support. Each property management team also works alongside a dedicated member of the accounts team.
LBM	Initially the handover and first few months of management would be dealt with by a member of the senior management team, which ensures the handover and legacy issues are dealt with and that the building and the board are both known at senior management level. Thereafter the RTM Company would be assigned one dedicated point of contact who would liaise with other team members as required. LBM has three teams of property managers, each led by a Portfolio Director with administrative support and Assistant Portfolio Managers who support the property managers. Board meetings would be attended by both the Portfolio Director and the property manager. In this case the initial handover would likely be done by James Lee, Director, and Sue Ripp, EA to Director. Most staff are degree-educated in a relevant field and all staff are asked to complete the TPI block management exams.
JFM	Nicola Finch, Property Manager. Lydia Malecaut, Assistant Property Manager. Debbie Cain, Team Manager. Priyashnee Naidoo, Client Accountant. Catherine Adams, Property Management Director.

C2 Portfolio density and welfare

How many other buildings or individual units would our designated Property Manager be looking after? What measures do you take to prevent staff burnout and ensure responsive on-site attendance?

JCF	Property manager portfolios vary depending on the size and complexity of the developments managed, typically in the range of 10 to 20 developments. Portfolios are kept under regular review so that senior management understands staffing requirements across the business and where additional resource may be required. All staff have monthly one-to-ones, there is an employee assistance programme, and teams work in pods to support each other.
Grace Miller	Currently each property manager looks after an average of 14.25 developments. Grace Miller states it is fully aware that overburdening managers is in no one's interest and takes care to monitor property managers and their workloads carefully in order to avoid this.
LBM	LBM does not allocate a specific number of buildings or units to individual property managers, precisely for the reasons raised in the question. The number of buildings managed is a function of the property manager's seniority, whether they have additional roles in the business, how many major works projects they have in their portfolio and how new their buildings are to LBM's management, with newer buildings taking more resource. Portfolios are constantly reviewed to ensure staff are not overworked. By way of indication, two property managers manage only one building each, and at the other end of the scale another colleague manages 12 much smaller buildings.
JFM	JFM adopts a minimum fee policy of £15,000 + VAT. The key reason for this policy was to cap maximum portfolio sizes, which JFM believes is the best way to combat growing requirements on property managers and give them the time needed per scheme to manage proactively and effectively. Average portfolio size is circa 6 to 8 estates or clients.

C3 Staff stability

What has your Property Manager turnover or staff retention rate been over the last three years? Frequent changes of manager have been a common source of frustration, and we want to understand your stability.

JCF	In the last three years JCF has had a turnover of four property managers.
Grace Miller	Grace Miller reports an excellent staff retention rate, with around two thirds of employees having been employed for five, ten, fifteen and over twenty years. It states that its collaborative team structure guarantees consistent service for clients and fosters a supportive working environment for staff, resulting in efficiency and low staff turnover.
LBM	LBM spends a lot of time interviewing and testing staff in order to hire the best possible people. Its policy of not introducing a property manager to an unknown building and client on day one means it can match people to buildings and clients better, which aids retention. It hires people in at junior level for them to grow within the company, which improves loyalty and longevity. At property manager level, the retention rate has been 85 to 90% year on year over the last three years.
JFM	The property management team at capacity currently comprises 1 Property Management Director, 4 Team Managers, 12 Property Managers or Key Client Managers and 12 Assistant Property Managers. Over the last year four people left the team: one property manager who retired, one assistant property manager who now works with JFM on a consultancy basis, and two further assistant property managers who were let go due to performance issues. JFM states its mission statement is focused on its staff and that this has translated to strong retention.

D. References, reputation and disputes

D1 Client references

Provide three distinct, contactable references. Ideally Directors of similar RTM Companies at properties of similar size, standard and location.

JCF	Three references named, with written testimonials included in the appendices, and JCF states it would be pleased for the RTM Company to contact them directly if successful in the selection process. Jane Doney, Hardwicks Square, Wandsworth, a client since 2020, whose testimonial covers management services, communication standards and support through a complex cladding remediation project. Jeremy Gilley MBE, founder of Peace One Day and freeholder of St George's House, Richmond upon Thames, covering management of building safety and major works including securing £1.5 million of Cladding Safety Scheme funding and managing roof and lift replacement works. Bassam Zaku, Director of North End House Ltd, covering a major communal heat network replacement project delivered on time and within budget.
Grace Miller	At this stage in the process Grace Miller would prefer not to share the contact details of existing clients, simply to avoid unnecessary disruption to them during early-stage enquiries. Should it be shortlisted, it will be happy to provide full reference contacts for three current clients who can speak directly of its performance and service standards.
LBM	Three references supplied with direct email addresses, all stated to have elements similar to 11 Point Pleasant: Keith Horne, Luminosity Court; Jules Paul, 417 Wick Lane; Michael Spencer, Exchange Building.
JFM	Three references supplied with direct email addresses: Camilla Fegan, Parr Court, 56 units; Joe Kelly, Tequila Wharf, 137 units; Charles Dixon, Cranfield Court, 50 units.

D2 Tribunal history

Disclose any First-tier Tribunal (Property Chamber) determinations involving your firm in the last five years. State the volume, nature and outcomes.

JCF	JCF has only attended the FTT on behalf of its clients in the last five years, and would be happy to provide further information on request for cases it has been involved in on behalf of clients.
Grace Miller	None.
LBM	LBM has only attended the FTT twice in the last five years and both were for manager appointments, so there have been no relevant determinations.
JFM	JFM has been involved in 4 tribunal claims over the previous 5 years. Of those 4, 3 were unanimously found in its clients' favour, which JFM describes as 80% in clients' favour. The remaining dispute related to a period before JFM's appointment.

D3 Public reviews

Are there any negative public reviews you would like to address or contextualise directly for the Board?

JCF	JCF states it maintains an overall Trustpilot rating of 4.5 out of 5 based on more than 200 independently submitted reviews, and that while no managing agent can satisfy every individual on every occasion, it believes the overall rating reflects the standard of service delivered across a substantial and varied portfolio. Where concerns are raised they are viewed as opportunities to improve; customer feedback is actively monitored, responded to constructively where appropriate, investigated, and used to enhance processes and service delivery. JCF encourages the Board to consider its reviews in the round.
Grace Miller	As far as Grace Miller is aware, only those visible on Google Reviews.
LBM	LBM states it is rated at around 4.0 on both Google and Trustpilot, which it says is higher than most other agents, and that reviews of all managing agents tend to be either a 1 or a 5 with little in between, because people are understandably emotional about their own homes. It cites one instance involving a tenant in a block with a dysfunctional lift made by a Greek manufacturer, where the contractor had to source replacement parts from Greece which took a few weeks. The block was kept fully up to date, but the tenant asked all of his friends to post 1-star reviews, resulting in a barrage of 1-star reviews. LBM states it takes all reviews seriously and personally but will not engage in a back and forth in the public domain, and offers to discuss reviews further.
JFM	None specifically to address.

E. Transition and mobilisation from NHG

E1 Mobilisation plan

Provide a high-level mobilisation plan, with a timeline and key milestones, for the handover period commencing on or around 1 October 2026 ahead of full operational responsibility on 1 January 2027.

JCF	A structured programme led by a dedicated Takeover Team supported by property management, admin and accounting teams. October 2026: formal instruction received, initial mobilisation meeting with RTM Directors, information request issued to the incumbent agent, review of lease, management responsibilities, service charge structure, contracts, compliance documentation, budgets, accounts and resident data. Milestones: takeover team appointed, information request issued. October to November 2026: full review of building compliance documentation including FRA, legionella, lift, AOV, CCTV, door entry, water systems and health and safety records; review of existing contractor performance and service specifications; identification of immediate risks and mobilisation priorities. Milestones: compliance audit completed, contractor review completed. November 2026: property manager site inspection, resident communication strategy agreed, establishment of banking arrangements, accounting systems and resident records, upload of development information to JCF systems and the resident portal. Milestones: systems setup completed, client bank accounts operational. November to December 2026: introduction meetings with incumbent contractors and specialist providers, tendering of contracts where required, review of PPM schedules and statutory inspection programme. Milestone: PPM and compliance schedule agreed. December 2026: welcome communication issued to all leaseholders and residents, director workshop to agree Year 1 priorities. Milestones: resident welcome pack issued, director objectives agreed. 1 January 2027: formal management handover, emergency contractor arrangements live, accounting and resident systems fully operational. January to March 2027: enhanced post-handover support including increased site attendance, monthly Director meetings, contractor performance reviews, resident engagement and completed financial reconciliation. Milestone: 90-day post-mobilisation review.
Grace Miller	Handover Method Statement attached. 1 October: issue the professional clearance letter to the outgoing managing agent and request core information so that it can be reviewed and the system readied for the start of management. Once information is received, set up systems and contact service and maintenance providers to advise of the takeover. Periodically chase the outgoing managing agent if required information is not received. 10 December: issue communication to owners providing information about the company, relevant contact details and information on the residents' portal. 1 January: management commences.
LBM	LBM would deal with everything surrounding the handover and with NHG. Once the agreement is signed, and around two months ahead of the handover date, it would approach NHG with a copy of its handover list. It does not do this any sooner or the information risks being stale by the handover date. At that time it also asks for copies of leaseholder contact information and insurance certificates by return. LBM would undertake a detailed site visit of the building with several colleagues, including members of its health and safety team, and would hold a meeting with the board during the last month of the handover period to gather as much information as possible and start prioritising projects in line with the Board's aspirations for the building. Its aim is to be in a position to hit the ground running on day one of the management period rather than waiting for the management to start and then requesting information. A copy of its standard handover list is attached.
JFM	Refers to the enclosed handover and mobilisation timetable in the attachments.

E2 Missing historical data

We are fully aware there may be a distinct lack of historical operational and financial information during the handover from NHG. How do you propose to navigate, audit and de-risk this transition period?

JCF	JCF undertakes a comprehensive review of all information received from both the RTM Company and the outgoing agent, covering service charge accounts and supporting schedules, budget history and expenditure analysis, reserve fund records, compliance documentation, maintenance contracts and contractor records, resident and leaseholder information, asset information and operating manuals, insurance records and claims history, and historic Section 20 consultations. Information gaps are recorded within a mobilisation action tracker so priorities can be agreed with the Directors. Where financial information is incomplete, the accounts team undertakes a reconciliation using historic accounts, bank statements, budget information, supplier records, debtor and creditor schedules and reserve fund statements, with particular focus on service charge cash balances, reserve fund holdings, outstanding debtor balances, contractor liabilities, accruals and prepayments and historic major works expenditure. Rather than relying solely on inherited records, JCF undertakes an independent review of the compliance position immediately following appointment, verifying fire risk assessments, lift inspections and LOLER certification, legionella risk assessments, electrical certification, AOV servicing records, CCTV and access control maintenance, health and safety assessments and contractor competency records. Where information is unavailable or cannot be verified, JCF assumes the records do not exist and procures replacement inspections or assessments where necessary. A physical site audit during mobilisation creates or validates asset registers, PPM schedules, compliance calendars, contractor responsibilities, utility arrangements and the building systems inventory. An enhanced reporting regime runs for the first six months, including monthly Director meetings, tracker updates, financial reconciliation updates, compliance status reporting and identification of legacy risks.
Grace Miller	As detailed under Setup and Handover Fees, Grace Miller would suggest an onboarding audit to identify any areas of particular concern, which would then be discussed with the Board.
LBM	LBM states it is very used to dealing with handovers which have ranged from excellent to awful, and that on three occasions it received no information at all. It states it can cope with any scenario: the Board and other leaseholders will know some of the information, and much of it is publicly available or obtainable if you know who to ask. If it does not receive much information, that is fine; it is just more work initially, but the building will end up in the same place.
JFM	JFM recognises that a transition from an incumbent agent can result in gaps in historical operational, compliance or financial information. Its mobilisation process is managed through Asana, where it maintains a comprehensive mobilisation tracker containing all documentation, records, contracts, financial information, compliance data and operational requirements necessary for a successful handover. Each item is assigned a status and a supporting evidence requirement before it can be marked complete, providing full visibility of outstanding information and ensuring gaps are identified and escalated early. A mobilisation cannot be signed off as complete until all critical actions have been addressed and the tracker reaches 100% completion. Should any records prove unobtainable and require replacement inspections, surveys, certifications or other remedial actions, JFM will provide the Board with a clear assessment of the associated risks, costs and recommendations before seeking approval to proceed.

E3 Commercial terms and exit

What contract term and notice period do you propose? Can either side end the agreement without cause? Itemise any exit, termination or document-transfer fees, and confirm your commitment to a prompt, collaborative handover of all funds and data to a successor agent.

JCF	An initial fixed term of 365 days commencing on the agreed start date. The agreement is intended to run for the full contractual term and expire at the end of the 365-day period unless terminated earlier in accordance with its provisions. The RTM Company may terminate before expiry if JCF is in material breach and fails to remedy within 30 days of written notice, if JCF becomes insolvent, or if a Tribunal appoints a manager or leaseholders exercise the Right to Manage or collective enfranchisement rights. JCF may terminate if fees remain unpaid, if the RTM Company is in material breach and fails to remedy within 30 days, if the RTM Company becomes insolvent, or if the RTM Company prevents JCF from carrying out its contractual obligations. JCF does charge an exit fee, which is approximately two weeks' management fee under its standard management agreement. On termination or expiry, all property documentation held by JCF is transferred to the client, any outstanding management fees or agreed charges remain payable, and property records and management information are handed over in accordance with the agreement. JCF commits to transferring all available management records, compliance documentation and certification records, providing financial reconciliations and supporting information, liaising with any successor agent and facilitating the prompt transfer of client funds held within designated trust accounts.
Grace Miller	Contract term would be 364 days, as per clause 13.1 of the Management Agreement. The contract is terminable by either side on the giving of three months' notice, as per clause 13.2. The handover fee is £500 plus VAT, as per clause 8.4. Any handover of records and funds would be made promptly.
LBM	In common with most managing agents, LBM's standard contract is 364 days in duration so that it is not a long term agreement under the Section 20 legislation, and it rolls on an annual basis. Either side can terminate the agreement without cause on 3 months' notice. There are no exit, termination or document transfer fees for leaving. LBM commits to a prompt collaborative handover of funds and information to a successor agent.
JFM	JFM's contracts are a 12-month term with a 3-month notice period that can be triggered at any time. There are no fees for exiting or handover on departure. JFM commits to a prompt and collaborative handover of all funds and data to any incoming agent should it lose the instruction.

F. Specialised competence

F1 Challenging the incumbent

If the RTM Company or residents decide to formally challenge or dispute historical service charge bills, accounts or balancing charges issued by NHG, how will your company be able to support and advise us?

JCF	JCF has extensive experience supporting RMCs and RTM Companies where concerns exist regarding historical service charge expenditure, balancing charges, reserve fund contributions or management practices undertaken by a previous agent or landlord. While it could not determine the legal merits of any challenge without reviewing the documentation, it would support the RTM Company through a structured review: reviewing historic budgets, year-end accounts and balancing charges; reviewing supporting invoices, contracts and expenditure records where available; identifying material variances, unusual expenditure trends or costs inconsistent with the lease; reviewing reserve fund contributions and expenditure; assessing whether Section 20 consultation requirements appear to have been followed; reviewing management agreements, contractor appointments and procurement records; and assisting Directors in understanding risks, liabilities and options. Where specialist advice is required it would facilitate the appointment of service charge accountants, building surveyors, leasehold solicitors, counsel specialising in landlord and tenant matters and forensic service charge consultants, and would assist in obtaining and organising historical records from NHG during mobilisation. JCF states it would act in an advisory and management capacity only and would not provide legal advice or determine the validity of any claim; formal challenges, recovery action, Tribunal applications or legal proceedings would require independent professional advice. It would provide ongoing administrative support, coordinate professional advisers, collate documentation and attend meetings where required.
Grace Miller	Grace Miller is happy to provide support and help where it can, but is not able to provide an open-ended commitment when dealing with issues that pre-date its appointment. It may be that the RTM Company would need to take the lead on this.
LBM	LBM can advise on the different options available should the RTM Company wish to challenge or dispute anything historical. It would typically not be able to take any action directly itself but can support the Board behind the scenes.
JFM	JFM would provide reasonable support and assistance where appropriate. This would include making available any information received during handover, assisting with verification of records where possible, and helping the RTM Company understand what documentation is held, what may be missing, and what further information may need to be requested from NHG to clarify costs and charges. It would also support the Board by coordinating requests for information, providing administrative assistance and liaising with accountants, solicitors or other professional advisers where instructed. Its role would be to assist with factual verification and information gathering; while it can make a professional recommendation or share its interpretation, it is unable to provide formal legal advice on historical matters.

F2 Warranty and defect claims

What is your specific experience pursuing developer and latent-defect or warranty claims, for example under the Defective Premises Act 1972, Building Safety Act 2022 remediation routes, or NHBC and other warranty providers?

JCF	JCF reports significant experience supporting RMCs, RTM Companies, freeholders and developers in the identification, management and resolution of building defects, latent defects and warranty claims across new-build and existing developments, including water ingress and building envelope failures, roofing defects, external wall and cladding defects, fire stopping and compartmentation failures, M&E installation defects, drainage and infrastructure defects, lift and building services defects, structural movement and construction quality issues, and defective landscaping, SUDS and external works. Building Safety Act experience includes Building Safety Fund applications, Cladding Safety Scheme applications, developer remediation negotiations, fire safety investigations, coordination of intrusive surveys and technical investigations, and management of remediation projects and stakeholder communications. Its portfolio includes a number of Higher-Risk Buildings. Recovery routes used include direct engagement with the original developer, NHBC Buildmark, Premier Guarantee, LABC Warranty and other warranty provider claims, professional negligence claims, Defective Premises Act 1972 claims, Building Safety Act 2022 remediation routes and contractual claims against consultants or contractors. Its role typically includes coordinating investigations and surveys, maintaining defect schedules, managing correspondence with developers and warranty providers, procuring specialist legal and technical advice, monitoring claim progress, reporting to Directors and residents and coordinating remedial works once liability is established. JCF states it does not provide legal or structural engineering advice directly but maintains relationships with building surveyors, fire engineers, structural engineers, building safety consultants, defects specialists and leasehold and construction solicitors.
Grace Miller	Grace Miller has dealt successfully with cladding remediation projects and with obtaining agreement from developers to fund the work. On latent defect and warranty claims, it reports a mixed response from developers and NHBC or warranty providers.
LBM	LBM has dealt with several very large NHBC and warranty claims against developers which were successful and resulted in six figure payouts to the buildings in question and extensive remedial works being undertaken. Post Grenfell it has also dealt with around 30 cladding-related projects of various sizes, up to £25 million, so has extensive experience of dealing with everything around the Building Safety Act and interacting with the various government departments on this. It has an in-house health and safety team of 4 staff who are heavily involved in dealing with HRBs and Building Safety Act matters.
JFM	**NO RESPONSE PROVIDED**

F3 Technology and accounting platforms

Name the resident portal and financial management software you use. Detail how residents log maintenance issues, how progress is tracked, and how the RTM Company accesses real-time financial reporting.

JCF	Qube Property Management Software for property management and service charge accounting, covering property and leaseholder records, budgeting, demand generation and collections, arrears monitoring, contractor and work order management, financial reporting, bank reconciliations, reserve fund accounting, compliance monitoring and management reporting. Fixflo for resident repair reporting and for management of health and safety and fire risk assessment actions; ITBox for building safety information and compliance documentation; UKNAR for asbestos management and record keeping. Residents report issues online 24 hours a day via desktop or mobile through Fixflo, selecting the language they wish to report in and the repair category, reviewing guidance and troubleshooting advice, uploading photographs and videos, and receiving immediate confirmation and ongoing updates; the system automatically creates a repair ticket with a complete audit trail. Property managers monitor repair progress in real time, issue contractor work orders, track contractor performance, escalate overdue actions and communicate directly with residents. Directors receive reporting generated through Qube covering income and expenditure, budget versus actual, arrears, creditors, bank reconciliation summaries, reserve fund statements, compliance reporting and property inspection reports; reports can be provided monthly, quarterly or at Director meetings depending on the RTM Company's requirements. A resident Fixflo reporting guide is included in the appendices.
Grace Miller	Property owners have access to Grace Miller's web portal, Myblockman, where they can log in securely and view their service charge account details online as well as general information relating to the building. The facility also enables Grace Miller to issue information, updates and critical announcements electronically. A link to a demonstration video was provided. The proposal states that online users can receive live announcements, view current service charge transactions, view and download current and previous service charge applications and statements, view estimates of expenditure and schedules and apportionment details, download documents such as accounts, house rules and notices about works, and view and update emergency contact details. All day-to-day accounting is carried out in-house by the accounts team with daily processing of financial transactions.
LBM	LBM uses MRI Qube, with a link provided to an overview video. While the relevant module is planned to be rolled out in the near future, at present Directors cannot log into MRI Qube directly; everything that would be expected to be seen on MRI Qube is available directly from LBM. LBM could look to set up a website for the building, as it does for many of its larger clients, with protected areas for leaseholders and directors and different documents available in each area. Financial reports and the issues list are typically shared with the board in quarterly meetings although they are available more regularly if required. All issues arising are logged on the issues list and prioritised as high, medium or low, with low being longer term or wish list items. This forms the basis of the report reviewed with the board at quarterly meetings, and once issues have been resolved and reviewed they are archived, leaving a constant running list of active issues at the building.
JFM	Re-Leased is JFM's primary property and financial management platform, used for accounting, service charge administration, contractor management, compliance records and operational activities, and includes the standard resident portal. Asana is a bespoke-built data tracking platform. The Ark App is an enhanced app option for resident engagement. Logan is a custom-built AI agent to assist with compliance records. The mobile app leaseholder portal is included within the management fee and allows leaseholders to review service charge history, report an issue directly into the block management software, view key information and documents about the block and receive electronic notifications. The optional ARK Enhanced Resident App provides bespoke branding, tenure group functionality, API connectivity to the Asana issue tracking system, bookings for community events, online payments, a site staff parcel scanning element, a news feed, AI tools that extract key themes from communications and draft responses for the property manager to edit, AI tools for identifying languages spoken by residents in line with Building Safety Act requirements, and features supporting access to critical fire safety information. Maintenance issues can be reported through the resident app where implemented, by email or by telephone, and all enquiries are logged into the Asana workflow management system to track actions, assign responsibility and monitor progress; where the ARK app is in use, updates synchronise with the associated task. JFM states that it does not currently provide the RTM Company with direct real-time access to its accounting system, and commits instead to comprehensive quarterly financial reporting packs including income and expenditure reporting, arrears information, bank reconciliations, budget monitoring and commentary on significant variances, with additional financial information available on reasonable request.

G. Scenario questions

G1 Uncooperative leak

A resident reports active water ingress through their ceiling from the flat above, but the source is not obvious, and the owner upstairs is slow to respond, uncooperative or completely absent. How would you handle it, in particular establishing the source and liability, coordinating communication, and gaining access to the flat above?

JCF	The immediate priority would be to protect the affected resident, identify the source and minimise further damage. The property manager would contact the affected resident, obtain photographs and details of the extent of the ingress and arrange for an emergency contractor to attend where necessary, to assess whether make-safe works are required and undertake initial investigations. JCF would not automatically assume the flat directly above is responsible, as water can travel considerable distances through floor voids, risers and service penetrations, so it would review building drawings, service layouts and the location of wet services to establish the most likely source. The leaseholder and occupier of the suspected apartment would be contacted immediately by telephone, email and written correspondence requesting access, using emergency contact details where available. The lease grants the landlord and its agents rights of access to inspect and investigate defects, and if access is not voluntarily provided JCF would issue formal notice under the relevant lease provisions. Should the source remain unclear, it would instruct a specialist leak detection contractor to undertake non-invasive investigations using moisture mapping, thermal imaging and acoustic testing. Regular communication would be maintained with both parties throughout. Once the source is identified, liability would be determined in accordance with the lease, the location of the defect and the nature of the failure, and JCF would coordinate remedial works, assist with insurance claims where appropriate and address any damage to communal areas. Where a leaseholder remains persistently uncooperative and lack of access is preventing investigation of ongoing damage, JCF would seek legal advice regarding enforcement of the lease provisions and, where necessary, pursue injunctive relief.
Grace Miller	Grace Miller states that it takes the management of conflict and challenging behaviour very seriously and approaches such situations in a structured, calm and professional manner, based on early intervention, clear communication and consistent process. Where a resident becomes dissatisfied or aggressive, the first priority is to try to de-escalate the situation through respectful dialogue, active listening and a clear explanation of the facts, responsibilities and any constraints involved. Wherever possible it seeks to resolve issues informally and promptly to prevent escalation. If identifying the leak was proving particularly difficult, it might seek to carry out further investigations, perhaps including a dye test or pressure test, having first tried to obtain agreement from the lessee or lessees that they will be responsible for the cost if the problem is found to be their responsibility.
LBM	The immediate priority would always be to protect the safety of residents and minimise further damage to the building before considering liability or cost recovery. The property manager would undertake an immediate assessment of severity, including whether the escape of water presents an immediate risk to life or property, for example significant water penetration, electrical hazards, potential ceiling collapse, multiple flats affected or water entering the common parts. An emergency contractor would be instructed without delay and the affected resident advised on immediate measures to minimise further damage pending attendance. At the outset LBM would not assume the flat above is the source, as water can migrate considerable distances and may originate from defective sanitary fittings, appliances, concealed pipework, communal service risers, roof coverings or the building fabric itself. Where access to the suspected apartment is required, every reasonable effort would be made to contact the occupier and leaseholder using all available contact details including telephone, email and emergency contact information held on file, and where the property is sublet LBM would also liaise with the managing or letting agent where known. Where the incident is causing significant ongoing damage, this may include isolating the water supply serving the affected apartment or relevant section of the building where this can be achieved safely from the common parts. Where access cannot be obtained voluntarily, LBM would consider the contractual rights available under the lease together with any wider legal remedies; it would not seek to force entry into a demised apartment unless there was clear lawful authority to do so, but where appropriate would liaise with the emergency services should they consider intervention necessary. Where the leak is not an emergency, the RTM Company, in taking over the landlord's covenants, may serve formal notice requiring access for inspection and, where appropriate, requiring the leaseholder to remedy the defect within the prescribed timescales, and may exercise its rights under the lease to undertake works in default and recover the costs where permitted. Once the source is identified and the leak stopped, LBM would coordinate permanent repairs, advise on the appropriate insurance route and ensure the incident is fully documented.

JFM	The first step would be to assess the severity of the leak and establish whether there is an immediate risk to life, electrical systems or significant property damage. JFM would then make multiple attempts to contact the resident and owner of the flat above using all available methods, including telephone, email and attendance at the property where appropriate, clearly communicating the urgency and requesting immediate access. Where the lease provides the necessary rights of entry, it would issue written notice requiring access within the prescribed timeframe, typically 24 or 48 hours depending on the lease provisions and the urgency; its preference would always be to secure voluntary cooperation, and any decision to exercise rights of entry would be proportionate to the severity and ongoing impact. If emergency access is required to prevent substantial damage to the building or neighbouring properties, it would consider exercising emergency powers under the lease and, where necessary, instruct an emergency contractor to gain access in the least intrusive manner possible. Once access is achieved, investigations would identify the source and determine whether it arises from a demised installation or from communal services. Regular communication would be maintained with both residents. Any access arrangements and remedial works would be accompanied by written confirmation that, should the cause be traced to demised services within the flat above, the owner of that flat would be responsible for the associated costs; JFM states that in its experience clearly setting out the potential liability at an early stage often encourages prompt cooperation.

G2 Friday night M&E failure

During a routine functional test on a Friday afternoon, the building's core AOV smoke-control ventilation system is found to be completely nonfunctional. Given the building's stay-put strategy and mid-rise profile, what immediate operational steps do you take, who do you notify, and what interim safety measures do you put in place until a specialist repair can occur?

JCF	A complete failure of the AOV system in a mid-rise building operating a stay put strategy would be treated as a significant life-safety incident requiring immediate escalation. JCF would first verify the extent of the failure with the specialist contractor undertaking the testing and obtain confirmation that the system is fully inoperable. It would then, without delay, notify the RTM Directors, notify the building's Fire Risk Assessor, instruct the incumbent AOV specialist contractor on an emergency call-out basis, review the existing Fire Risk Assessment and any evacuation strategy documentation, and record the incident within the building's compliance management system. A dynamic fire risk assessment would be undertaken with the Fire Risk Assessor and specialist contractor to determine the impact on the fire strategy and the level of interim controls required. Depending on the advice received, interim measures may include enhanced inspection of common areas, additional out-of-hours site attendance, temporary fire patrols or waking watch arrangements where recommended, verification that emergency lighting, fire doors and passive fire protection remain fully operational, immediate removal of combustible materials from communal areas, temporary suspension of non-essential high-risk works, and resident communications advising of the fault, expected repair timescales and any temporary precautions. Where the Fire Risk Assessor considers the failure materially affects the fire strategy, JCF would consult the local Fire and Rescue Service and implement any additional recommendations. As the incident occurs on a Friday afternoon, the matter would remain under active management throughout the weekend by the property manager, out-of-hours team and specialist contractor. Following restoration, JCF would obtain certification confirming satisfactory operation, review the root cause and provide a full incident report to the Directors with recommendations to reduce the likelihood of recurrence.
Grace Miller	A total AOV failure would be treated as a critical life-safety defect and interim risk reduction measures would need to be implemented until the system could be repaired by a competent specialist. Grace Miller would: contact the AOV maintenance contractor to see if an urgent, same-day repair or temporary reinstatement could be arranged; inform residents, ideally via the portal or email, that the AOV system is temporarily out of service, that repairs are being arranged urgently and that the stay put strategy remains in place unless smoke or fire affects their flat, in which case they should evacuate normally, aiming to provide reassurance and avoid causing alarm; consider notifying the Fire and Rescue service so they can allow for any pre-planning; notify the building's insurer if required by the policy; arrange regular patrols of the common areas to check for signs of fire or ignition sources; check that other fire safety systems, including fire doors and emergency lighting, are fully functional; consider manually opening the AOVs as a temporary measure or propping open fire doors if this can be approved by a competent fire engineer; and ensure all actions are recorded.
LBM	The failure of a life safety system demands an immediate and structured response, with the priority being to understand the nature and extent of the fault, implement proportionate interim safety measures and restore the system as quickly as reasonably practicable. LBM would immediately verify whether the fault affected the entire system or only a specific control panel, smoke shaft or vent, and review the engineer's findings to determine whether the system could be returned to service immediately, whether manual operation remained available and whether the building's fire strategy had been compromised. As the building exceeds 11 metres in height, if the smoke control system is expected to remain unavailable for more than 24 hours LBM would notify the London Fire Brigade in accordance with their guidance. Simultaneously it would liaise with the RTM Directors and its fire safety advisers to undertake a dynamic assessment of the risk and determine the most appropriate interim measures; while a waking watch may be appropriate depending on the nature and duration of the fault, this would not be implemented automatically, and any compensatory measures would be proportionate to the level of risk and informed by competent fire safety advice. In parallel it would escalate the matter with the incumbent maintenance contractor, requesting emergency attendance including out of hours where necessary, with the objective of minimising both the duration of the impairment and the costs associated with interim safety measures. Residents would be kept informed throughout, with a communication explaining the nature of the fault, the action being taken, any temporary fire safety arrangements introduced and a reminder of the building's fire action strategy, requesting that communal fire doors remain closed. Once rectified, the system would be fully tested and recommissioned by the specialist contractor before returning to normal operation, the incident and any interim measures fully documented, a review undertaken to identify lessons learned, and the London Fire Brigade notified of the resolution.

JFM	The failure would be treated as a critical life safety incident and escalated immediately. JFM would notify the RTM Directors and instruct its specialist AOV maintenance contractor to attend on an emergency basis, subject to any cost approval requirements. It would also consult its retained fire safety consultants, Ahead Start Consulting, to assess the impact on the building's fire strategy and advise on any additional interim control measures. As the building operates a stay put strategy, JFM states there is no immediate risk to residents within their apartments and, unless advised otherwise by its fire safety consultants or the London Fire Brigade, it would not seek to implement a waking watch or evacuate the building, focusing instead on proportionate interim measures and rectifying the fault as quickly as possible. It would ensure all communal escape routes and fire doors remain unobstructed and maintain heightened oversight until the system is restored, and would inform its out-of-hours provider so they can proactively monitor the situation over the weekend, manage related incidents and provide updates. Residents would be kept informed and advised that emergency remedial works are in hand. Detailed records would be maintained of actions taken, contractor attendance and advice received, and the situation would remain under active review until the system has been repaired, tested and confirmed fully operational.

Source: the complete tender submissions of all four firms, comprising ITT responses, fee proposals, management agreements and additional charges schedules, organisation charts, mobilisation plans, handover lists and method statements. Answers are set out in each firm's own terms and are condensed rather than quoted verbatim; figures and commitments are reproduced as stated in the submissions.