

## Appendix A - Notice of Intention - Qualifying Works

NAME  
ADDRESS  
ADDRESS  
ADDRESS  
POSTCODE

DATE

Dear «Name» (name of leaseholder/name of recognised tenants' association)

### LANDLORD'S NOTICE OF INTENT TO ENTER INTO A CONTRACT FOR A QUALIFYING WORKS

Statutory Instrument 2003 No.1987 of the Commonhold and Leasehold Reform Act 2002

Works ref	Scheme ref	Property Ref	Property Address
«works ref»	«Scheme ref»	«Property Ref»	«Property Address»

I am writing to inform you that Tamworth BC intends to enter into an agreement to carry out works that relate to the building and/or estate (if applicable) that your property forms a part:

**insert description of the works**

These services are considered necessary for the following reason/s:

**insert reason for the works**

As the proposed services affect the building or estate that your property forms a part and under the terms of your lease you have an obligation to contribute towards the cost of these services, you have the right to tell us what you think of the proposal. If you do have any observations, you should submit these in writing to the address below.

Please note that this is the first stage of consultation and estimates for these services will not be known until the contract is tendered. You will be notified of your individual estimated contribution during the second phase of consultation.

You also have the right to nominate a person or organisation that you would like us to approach for a tender. Please note that any nominated contractor that we approach may be rejected if they do not meet the reasonable requirements of Tamworth BC's Procurement Policy which are:

## Appendix A - Notice of Intention - Qualifying Works

The contractor should be able to provide evidence of public liability insurance, a valid tax exemption certificate, confirmation of VAT status, and copies of their health and safety policy. We may also ask for evidence of experience carrying out similar kinds of work and references. In some cases, we may also need to assess credit records.

Where a single nomination is made by only one leaseholder, we will try to obtain an estimate from this person/organisation. Where a single nomination is made by more than one leaseholder, we shall try to obtain an estimate:

- a. from the person who received the most nominations; or
- b. if there is no such person, but two (or more) persons received the same number of nominations and in excess of the nominations received by any other person, from one of those two (or more) persons; or
- c. in any other case, from any nominated person

All comments, observations and or nominations must be received within 30 days from the date of this notice. Please note that the consultation period will end on S20\_30\_Day\_Expiration.

I attach for your information a leaflet which gives you more information on the Section 20 consultation process and explains the payment options available to you when you are invoiced for works carried out.

I hope this information is clear but if you require any further clarification, please do not hesitate to contact insert name on «telephone number».

Yours sincerely,

«insert name»  
insert job title

Please Note:

- 1) If you are not the legal owner of this property, please forward this Notice to them as soon as possible - Leaseholders only.
- 2) If you are in the process of selling your home, you should give a copy of this Notice to the prospective purchaser - Leaseholders only.
- 3) This notice is issued pursuant to s20 of the Landlord and Tenant Act 1985 (as amended by, but not limited to the Landlord and Tenant Act 1987 and the Commonhold and Leasehold Reform Act 2002).

Notes

- 1) Section 20 of the Landlord and Tenant Act 1985 (as amended) provides that a landlord must consult leaseholders who are required under the terms of their leases to contribute to costs incurred under qualifying works, where the contribution of any one leaseholder will exceed £250.

## **Appendix A - Notice of Intention - Qualifying Works**

- 2) Where a notice specifies a place and hours for inspection:
  - a. the place and hours so specified must be reasonable; and
  - b. a description of the proposed works must be available for inspection, free of charge, at that place and during those hours. If facilities to enable copies to be taken are not made available at the times at which the description may be inspected, the landlord shall provide to any leaseholder, on request and free of charge, a copy of the description.
  
- 3) The landlord has a duty to have regard to written observations made within the consultation period by any leaseholder or recognised tenants' association. 'Recognised tenants' association' is defined by Section 29 of the 1985 Act.

**Appendix A - Notice of Intention - Qualifying Works**

## Comments, Observations & Nominations Form

THIS FORM RELATES TO PROPOSED WORKS/SERVICES AND SHOULD BE RETURNED BEFORE  
THE END OF THE CONSULTATION PERIOD.

The consultation period for the proposed works ends on S20\_30\_Day\_Expiration. If you would like to make any comments or observations about the work, please complete the section below and return it to us at:

«Contact Name»  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3  
Address\_Line\_4  
Postcode

Any comments or observations must reach us by S20\_30\_Day\_Expiration to be considered.

Scheme: «Scheme ref»  
Works: «insert description of works»

Works Ref: «works ref»  
Name: Name  
Address: «Property Address»

Comments/Observations

**Appendix A - Notice of Intention - Qualifying Works**

IF YOU NEED TO, PLEASE CONTINUE ON A SEPARATE SHEET OF PAPER

I would like to nominate a Contractor to bid for this work. The name and full address of the Company/person is:

Name (please print):

Signed:

Contact Telephone Number:

Date:

## Appendix B - Notification of Proposed Contract - Qualifying Works

NAME  
ADDRESS  
ADDRESS  
ADDRESS  
POSTCODE

DATE

Dear «Name»

### LANDLORD'S PROPOSAL TO ENTER INTO A CONTRACT FOR QUALIFYING WORKS

Statutory Instrument 2003 No.1987 of the Commonhold and Leasehold Reform Act 2002

Works ref	Scheme ref	Property Ref	Property Address
«works ref»	«Scheme ref»	«Property Ref»	«Property Address»

I am writing to inform you further to our letter of (insert date) that we intend to enter into an agreement for the following works that relate to the building and/or estate (if applicable) that your property forms a part. The consultation period in respect of the notice of intention ended on (insert date):

«insert description of works»

These works are considered necessary for the following reason/s:

«insert reason for the works»

We have now obtained estimates for these works. We approached No\_of\_Contractors\_Approached contractors to provide tenders and received No\_of\_Estimates\_Returned returns. We have shortlisted **two** contractors and enclose details, as required by law, on the attached Statement of Estimates. This includes your estimated contribution towards the work.

We currently propose to select **Tender A**.

As the proposed works affect the building that your property forms a part, you have the right to tell us what you think of the proposal. If you do have any observations, you should submit these in writing to the address below.

All comments and observations must be received within 30 days from the date of this notice. Please note that the consultation period will end on S20\_30\_Day\_Expiration.

You can view the actual estimates and any supporting documentation at this office. If this isn't too large, we are happy, on request, to send you a copy. If this isn't practical, or you would like to see further evidence of the supporting documentation, you can make an appointment to inspect the priced

## **Appendix B - Notification of Proposed Contract - Qualifying Works**

specification, the estimates and all relevant documentation at this office from Monday to Friday between the hours of 9am-5pm. If you would like to arrange an appointment, please contact «insert name» beforehand on «telephone number».

Please note that this is not a demand for payment. An invoice for these works will only be produced on practical completion of these works.

Below is a summary of the written observations received during the consultation period of the Landlords Notice of Intent and a summary of our response.

No written observations were received during the consultation period.

I attach for your information a leaflet which gives you more information on the Section 20 consultation process and explains the payment options available to you when you are invoiced for works carried out.

I hope this information is clear but if you require any further clarification, please do not hesitate to contact insert name on «telephone number».

Yours sincerely,

«insert name»  
insert job title

Please Note:

- 1) If you are not the legal owner of this property, please forward this Notice to them as soon as possible.
- 2) If you are in the process of selling your home, you should give a copy of this Notice to the prospective purchaser.

## **Appendix B - Notification of Proposed Contract - Qualifying Works**

3) This notice is issued pursuant to s20 of the Landlord and Tenant Act 1985 (as amended by, but not limited to the Landlord and Tenant Act 1987 and the Commonhold and Leasehold Reform Act 2002).



## Appendix B - Notification of Proposed Contract - Qualifying Works

### STATEMENT OF ESTIMATE

This Statement of Estimates provides detail of the two estimates short-listed from the tenders received. We presently propose to accept «Contractor A» as we believe that contractor offers the best value for money. We are unaware of any relationship as defined by SI 2003 No1987 Schedule 1 (5) (5) between the proposed contractor and members of Tamworth BC or its subsidiaries.

Your proportion of costs is calculated by distinguishing the amount rechargeable to your block and apportioning costs using the formula laid down in your lease agreement. Under the terms of your lease, you will be required to contribute approximately Percentage% towards these costs. Your contribution is also subject to a «10%» management fee.

#### TENDER A

CONTRACTOR: Name of Contractor A of Address  
CONTRACT COST: £Value of Tender A inclusive of VAT  
CONSULTANT: Name of Consultant  
CONSULTANT'S RATE: £Professional fees inclusive of VAT  
CONTRACT COST (INCL): £Total Value of Tender A including Professional fees inclusive of VAT

Estimated cost of work to your block

Estimated Cost to Block: £Tender A Block Cost  
Estimated Cost to Block (incl): £Tender A Block Cost including Professional Fees  
Your total estimated cost: £Estimate A including Professional fees inclusive of VAT

Your estimated contribution (including management fee at 10 per cent management fee)

**£Estimate A including Professional Fees and Management Fee**

## Appendix B - Notification of Proposed Contract - Qualifying Works

### TENDER B

CONTRACTOR: Name of Contractor B of Address  
CONTRACT COST: £Value of Tender B inclusive of VAT  
CONSULTANT: Name of Consultant  
CONSULTANT'S RATE: £Professional fees inclusive of VAT  
CONTRACT COST (INCL): £Total Value of Tender B including Professional fees inclusive of VAT

Estimated cost of work to your block

Estimated Cost to Block: £Tender B Block Cost  
Estimated Cost to Block (incl): £Tender B Block Cost including Professional Fees  
Your total estimated cost: £Estimate B including Professional fees inclusive of VAT

Your estimated contribution (including management fee at 10 per cent management fee)

**£Estimate B including Professional Fees and Management Fee**

## Appendix B - Notification of Proposed Contract - Qualifying Works

Delete if not applicable Please note that as you are within the initial or reference period of your purchases under the Right to Buy or Right to Acquire scheme your contribution for these works is « S125\_Cap\_»

## Appendix B - Notification of Proposed Contract - Qualifying Works

### Payment Options

It is recognised that charges arising from works can cause hardship and, although you are not required to pay anything on the enclosed estimate, an invoice will be sent to you once the works have been completed.

The invoice will be payable within 28 days therefore it is important that you begin to consider how you will finance your share of the costs. If you believe that you will not have sufficient funds to pay the invoice when it is sent the following options may be of assistance to you:

- 1) You could consider setting up a savings account in the interim that you can make regular payments into and those savings would normally earn you interest.
- 2) If you have a mortgage from a Building Society or Bank, you can approach them to extend your mortgage to cover the cost of the works.
- 3) You may want to investigate whether you can secure a loan with a lower rate of interest from a reputable external provider.
- 4) If you are on a low income (whether you are already in receipt of benefits or not), the charge may sufficiently increase your housing costs to qualify you for further assistance.

You will be sent the telephone numbers of those agencies that may be able to assist in assessing your situation when you are sent your invoice.

#### Are you in debt and in need of advice?

For basic advice on debt, please contact insert name.

For specialist independent debt advice, you can call the National Debt helpline free on 0808 808 4000 Monday to Friday 9am to 9pm and Saturday 9.30am to 1pm. Or visit [www.nationaldebtline.co.uk](http://www.nationaldebtline.co.uk)

The National Debt line is a national telephone help line for people with debt problems. The service is free, confidential and independent. The service provides self-help advice to its callers and also produces booklets and fact sheets on managing debt. The service can also help callers with Debt Management Plans

## Appendix B - Notification of Proposed Contract - Qualifying Works

### Comments and Observations Form

THIS FORM RELATES TO PROPOSED WORKS AND SHOULD BE RETURNED BEFORE  
THE END OF THE CONSULTATION PERIOD.

The consultation period for the proposed works ends on  
S20\_30\_Day\_Expiration.

If you would like to make any comments or observations about the work,  
please complete the section below and return it to us at:

«Contact Name»  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3  
Address\_Line\_4  
Postcode

Any comments or observations must reach us by S20\_30\_Day\_Expiration to be  
considered.

Scheme: «Scheme ref»  
Works: «insert description of works»

Works Ref: «works ref»  
Name: Name  
Address: «Property Address»

Comments/Observations

IF YOU NEED TO, PLEASE CONTINUE ON A SEPARATE SHEET OF PAPER

Name (please print):

Signed:

Contact Telephone Number:

Date:

## Appendix B - Notification of Proposed Contract - Qualifying Works

### Quality of Works Feedback Form

THIS FORM RELATES TO ONGOING WORKS AND SHOULD NOT BE  
RETURNED BEFORE THE WORKS COMMENCE.

We want you to be happy with the quality of works we intend to carry out.

If you are therefore dissatisfied with any aspect of the works, please complete the section below and return it to us at:

«Contact Name»  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3  
Address\_Line\_4  
Postcode

It is important that you contact us at the earliest possible opportunity so the matter can be investigated promptly.

Scheme: Scheme ref  
Works: insert description of works

Works Ref: «works ref»  
Name: Name  
Address: «Property Address»

Comments	Location	Date of Observation

Name (please print):

Signed:

Contact Telephone Number:

This will only be used if we need to contact you for clarification.

Date:

## Appendix D - Notice of Intention - Qualifying Works where Public Notice is required

NAME  
ADDRESS  
ADDRESS  
ADDRESS  
POSTCODE

DATE

Dear «Name» (name of leaseholder/name of recognised tenants' association)

### LANDLORD'S NOTICE OF INTENT TO ENTER INTO A CONTRACT FOR A QUALIFYING WORKS

Statutory Instrument 2003 No.1987 of the Commonhold and Leasehold Reform Act 2002

Works ref	Scheme ref	Property Ref	Property Address
«works ref»	«Scheme ref»	«Property Ref»	«Property Address»

I am writing to inform you that Tamworth BC intends to enter into an agreement to carry out works that relate to the building and/or estate (if applicable) that your property forms a part:

insert description of the works

These services are considered necessary for the following reason/s:

insert reason for the works

As the proposed services affect the building or estate that your property forms a part and under the terms of your lease, you have an obligation to contribute towards the cost of these services, you have the right to tell us what you think of the proposal. If you do have any observations, you should submit these in writing to the address below.

Please note that this is the first stage of consultation and estimates for these services will not be known until the contract is tendered. You will be notified of your individual estimated contribution during the second phase of consultation.

Please note that you DO NOT have the right in this instance to nominate a person or organisation that you would like us to approach for a tender. This is because under UK procurement rules, due to the value of the contract we are required to advertise the contract by public notice using the Find A Tender service.

## Appendix D - Notice of Intention - Qualifying Works where Public Notice is required

All comments and observations must be received within 30 days from the date of this notice. Please note that the consultation period will end on S20\_30\_Day\_Expiration.

I attach for your information a leaflet which gives you more information on the Section 20 consultation process and explains the payment options available to you when you are invoiced for works carried out.

I hope this information is clear but if you require any further clarification, please do not hesitate to contact insert name on «telephone number».

Yours sincerely,

«insert name»  
insert job title

Please Note:

- 1) If you are not the legal owner of this property, please forward this Notice to them as soon as possible - Leaseholders only.
- 2) If you are in the process of selling your home, you should give a copy of this Notice to the prospective purchaser - Leaseholders only.
- 3) This notice is issued pursuant to s20 of the Landlord and Tenant Act 1985 (as amended by, but not limited to the Landlord and Tenant Act 1987 and the Commonhold and Leasehold Reform Act 2002).

Notes

- 1) Section 20 of the Landlord and Tenant Act 1985 (as amended) provides that a landlord must consult leaseholders who are required under the terms of their leases to contribute to costs incurred under qualifying works, where the contribution of any one leaseholder will exceed £250.
- 2) Where a notice specifies a place and hours for inspection:
  - a. the place and hours so specified must be reasonable; and
  - b. a description of the proposed works must be available for inspection, free of charge, at that place and during those hours. If facilities to enable copies to be taken are not made available at the times at which the description may be inspected, the landlord shall provide to any leaseholder, on request and free of charge, a copy of the description.
- 3) The landlord has a duty to have regard to written observations made within the consultation period by any leaseholder or recognised tenants'



## Appendix D - Notice of Intention - Qualifying Works where Public Notice is required

association. 'Recognised tenants' association' is defined by Section 29 of the 1985 Act.

### Comments and Observations Form

THIS FORM RELATES TO PROPOSED WORKS/SERVICES AND SHOULD BE RETURNED BEFORE THE END OF THE CONSULTATION PERIOD.

The consultation period for the proposed works ends on S20\_30\_Day\_Expiration. If you would like to make any comments or observations about the work, please complete the section below and return it to us at:

«Contact Name»  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3  
Address\_Line\_4  
Postcode

Any comments or observations must reach us by S20\_30\_Day\_Expiration to be considered.

Scheme: «Scheme ref»  
Works: «insert description of works»

Works Ref: «works ref»  
Name: Name  
Address: «Property Address»

Comments/Observations

**Appendix D - Notice of Intention - Qualifying Works where Public Notice is required**

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IF YOU NEED TO, PLEASE CONTINUE ON A SEPARATE SHEET OF PAPER

Name (please print):

Signed:

Contact Telephone Number:

Date:

## Appendix C - Notification of Award of Contract - Qualifying Works

Name  
Address  
Address  
Address  
Postcode

DATE

Dear «Name» (name of leaseholder/name of recognised tenants' association)

### LANDLORD'S NOTICE OF REASONS FOR AWARDING A CONTRACT TO CARRY OUT WORKS

Statutory Instrument 2003 No.1987 of the Commonhold and Leasehold Reform Act 2002

Works ref	Scheme ref	Property Ref	Property Address
«works ref»	«Scheme ref»	«Property Ref»	«Property Address»

This notice is given following the statement of estimates issued on (insert date of notice of proposals). The consultation period in respect of the notice of proposals ended on (insert relevant date).

We have now entered into an agreement for provision of the (insert description of the works) first described in the notice of intention dated (insert date of notice of intention) with (name of chosen contractor).

Our reasons for doing so are (state reasons) (see Note 1 below)

or

A statement of our reasons for doing so may be inspected at (specify place and hours for inspection) (see Notes 1 and 2 below)

We did not receive within the consultation period any written observations in relation to the statement of estimates given on (insert date of notice of proposals) (see Note 3 below)

The written observations in relation to the proposals received during the consultation period may be summarised as follows: (insert summary of observations). Our response to the observations is (state response) (see Note 3 below)

or

A summary of the written observations received during the consultation period, together with our response to them may be inspected at (specify place and hours for inspection) (see Notes 2 and 3 below)

## Appendix C - Notification of Award of Contract - Qualifying Works

I attach for your information a leaflet which gives you more information on the Section 20 consultation process and explains the payment options available to you when you are invoiced for works carried out.

I hope this information is clear but if you require any further clarification, please do not hesitate to contact insert name on «telephone number».

Yours sincerely,

«insert name»  
insert job title

Please Note:

- 1) If you are not the legal owner of this property, please forward this Notice to them as soon as possible - Leaseholders only.
- 2) If you are in the process of selling your home, you should give a copy of this Notice to the prospective purchaser - Leaseholders only.
- 3) This notice is issued pursuant to s20 of the Landlord and Tenant Act 1985 (as amended by, but not limited to the Landlord and Tenant Act 1987 and the Commonhold and Leasehold Reform Act 2002).

Notes

1. Landlords do not need to send out this notice of reasons and summary/responses if:
  - a. the chosen contractor was nominated by a leaseholder, or
  - b. the chosen contractor was the person who submitted the lowest estimate.
2. Where a notice specifies a place and hours for inspection:
  - a. the place and hours so specified must be reasonable; and
  - b. copies of the documents must be available for inspection, free of charge, at that place and during those hours. If facilities to enable copies to be taken are not made available and at the times at which the documents may be inspected, the landlord shall provide to any leaseholder, on request and free of charge, a copy of the documents.
3. Where a landlord has received written observations within a consultation period in relation to a statement of estimates in relation to proposed works, he is required to summarise the observations and respond to them within a notice of his reasons for awarding a contract.

**Appendix C - Notification of Award of Contract - Qualifying Works**

Appendix J - Qualifying LTA – Services or Works - Notification of Proposals where Public Notice required

Name  
of the Current Homeowner  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3  
Address\_Line\_4  
Postcode

DATE

Dear (Name)

LANDLORD’S PROPOSAL TO ENTER INTO A CONTRACT FOR A QUALIFYING  
LONG-TERM AGREEMENT FOR WORKS/SERVICES  
Statutory Instrument 2003 No.1987 of the Commonhold and Leasehold Reform Act 2002

Works ref	Scheme ref	Property Ref	Property Address
«works ref»	«Scheme ref»	«Property Ref»	«Property Address»

We wrote to you on (insert date) to let you know of our intention to enter into a new long-term agreement to make sure that your home is properly maintained. I am writing to inform you that, subject to your observations, we intend to enter into an agreement for the following works/services that relate to the building and/or estate (if applicable) that your property forms a part:

«insert description of works/services»

These works are considered necessary for the following reason/s:

«insert reason for the works/services»

We have now obtained estimates for these works. We approached No\_of\_Contractors\_Approached contractors to provide tenders and received No\_of\_Estimates\_Returned returns. We have shortlisted two contractors and enclose details, as required by law, on the attached Statement of Estimates. This includes your estimated contribution towards the work.

We currently propose to select Tender A.

**This Notice is the second stage in the process and does not mean that any works are due to take place on your building imminently. This process is to put in place the contracts, which will allow us to deliver our (insert description of contract here i.e. major and planned works) in the future, as part of our planned investment programme.**

**At the point we identify any works that are required to your building, there will be a further consultation notice when the programme is agreed, prior to commencement of any works (where the cost to you of the works would exceed the relevant threshold - currently £250). This will provide details of the proposed works and the estimated costs and you will again be invited to submit observations before the works are carried out.**

«Contact Name» As the proposed works/services affect the building that your property forms a part, you have the right to tell us what you think of the proposal. If you do have any observations, you should submit these in writing to the address below.  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3

All comments and observations must be received within 30 days from the date of this notice. Please note that the consultation period will end on S20\_30\_Day\_Expiration.

You can view the actual estimates and any supporting documentation at this office. If this isn't too large, we are happy, on request, to send you a copy. If this isn't practical, or you would like to see further evidence of the supporting documentation, you can make an appointment to inspect the priced specification, the estimates and all relevant documentation at this office from Monday to Friday between the hours of 9am-5pm. If you would like to arrange an appointment, please contact «insert name» beforehand on «telephone number».

Below is a summary of the written observations received during the consultation period of the Landlords Notice of Intent and a summary of our response.

No written observations were received during the consultation period.

I attach for your information a leaflet which gives you more information on the Section 20 consultation process and explains the payment options available to you when you are invoiced for works carried out.

I hope this is clear but if you require any further clarification, please do not hesitate to contact insert name on «telephone number».

Yours sincerely,

«insert name»

insert job title

Please Note:

- 1) If you are not the legal owner of this property, please forward this Notice to them as soon as possible.
- 2) If you are in the process of selling your home, you should give a copy of this Notice to the prospective purchaser.
- 3) This notice is issued pursuant to s20 of the Landlord and Tenant Act 1985 (as amended by, but not limited to the Landlord and Tenant Act 1987 and the Commonhold and Leasehold Reform Act 2002).



# STATEMENT OF ESTIMATE

This Statement of Estimates provides detail of the two estimates short-listed from the tenders received. We presently propose to accept «Contractor A» as we believe that contractor offers the best value for money. We are unaware of any relationship as defined by SI 2003 No1987 Schedule 1 (5) (5) between the proposed contractor and Tamworth BC.

Your proportion of costs is calculated by distinguishing the amount rechargeable to your block and apportioning costs using the formula laid down in your lease agreement. Under the terms of your lease, you will be required to contribute approximately Percentage% towards these costs. Your contribution is also subject to a «10%» management fee.

## **TENDER A**

CONTRACTOR: Name of Contractor A of Address  
CONTRACT COST: £Value of Tender A inclusive of VAT  
CONSULTANT: Name of Consultant  
CONSULTANT'S RATE: £Professional fees inclusive of VAT  
CONTRACT COST (INCL): £Total Value of Tender A including Professional fees inclusive of VAT

Estimated cost of work to your block

Estimated Cost to Block: £Tender A Block Cost  
Estimated Cost to Block (incl): £Tender A Block Cost including Professional Fees  
Your total estimated cost: £Estimate A including Professional fees inclusive of VAT

Your estimated contribution (including management fee at 10 per cent management fee)

**£Estimate A including Professional Fees and Management Fee**

## **TENDER B**

CONTRACTOR: Name of Contractor B of Address

CONTRACT COST: £Value of Tender B inclusive of VAT

CONSULTANT: Name of Consultant

CONSULTANT'S RATE: £Professional fees inclusive of VAT

CONTRACT COST (INCL): £Total Value of Tender B including Professional fees inclusive of VAT

Estimated cost of work to your block

Estimated Cost to Block: £Tender B Block Cost

Estimated Cost to Block (incl): £Tender B Block Cost including Professional Fees

Your total estimated cost: £Estimate B including Professional fees inclusive of VAT

Your estimated contribution (including management fee at 10 per cent management fee)

**£Estimate B including Professional Fees and Management Fee**

Delete if not applicable Please note that as you are within the initial or reference period of your purchases under the Right to Buy or Right to Acquire scheme your contribution for these works is « S125\_Cap\_»

## Payment Options

It is recognised that charges arising from works can cause hardship and, although you are not required to pay anything on the enclosed estimate, an invoice will be sent to you once the works have been completed.

The invoice will be payable within 28 days therefore it is important that you begin to consider how you will finance your share of the costs. If you believe that you will not have sufficient funds to pay the invoice when it is sent the following options may be of assistance to you:

- 1) You could consider setting up a savings account in the interim that you can make regular payments into and those savings would normally earn you interest.
- 2) If you have a mortgage from a Building Society or Bank, you can approach them to extend your mortgage to cover the cost of the works.
- 3) You may want to investigate whether you can secure a loan with a lower rate of interest from a reputable external provider.
- 4) If you are on a low income (whether you are already in receipt of benefits or not), the charge may sufficiently increase your housing costs to qualify you for further assistance.
- 5) Leaseholders who have exercised their Right to Buy as a secure tenant within the last 10 years may have the Right to a Loan from their Local Authority under s450(A) of the Housing Act 1985 (as amended). It is only available for service charges relating to repairs, renewal and maintenance and if the demand is for more than £1,500 (value as at 1992, which is updated annually for inflation).

You will be sent the telephone numbers of those agencies that may be able to assist in assessing your situation when you are sent your invoice.

### Are you in debt and in need of advice?

For basic advice on debt, please contact insert name.

For specialist independent debt advice, you can call the National Debt helpline free on 0808 808 4000 Monday to Friday 9am to 9pm and Saturday 9.30am to 1pm. Or visit [www.nationaldebtline.co.uk](http://www.nationaldebtline.co.uk)

The National Debt line is a national telephone help line for people with debt problems. The service is free, confidential and independent. The service provides self-help advice to its callers and also produces booklets and fact sheets on managing debt. The service can also help callers with Debt Management Plans

# Comments and Observations Form

THIS FORM RELATES TO PROPOSED WORKS AND SHOULD BE RETURNED BEFORE  
THE END OF THE CONSULTATION PERIOD.

The consultation period for the proposed works ends on  
S20\_30\_Day\_Expiration.

If you would like to make any comments or observations about the work,  
please complete the section below and return it to us at:

«Contact Name»  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3  
Address\_Line\_4  
Postcode

Any comments or observations must reach us by S20\_30\_Day\_Expiration to  
be considered.

Scheme: «Scheme ref»  
Works: «insert description of works»

Works Ref: «works ref»  
Name: Name  
Address: «Property Address»

Comments/Observations

IF YOU NEED TO, PLEASE CONTINUE ON A SEPARATE SHEET OF PAPER

Name (please print):

Signed:

Contact Telephone Number:

Date:

# Quality of Works Feedback Form

THIS FORM RELATES TO ONGOING WORKS AND SHOULD NOT BE  
RETURNED BEFORE THE WORKS COMMENCE.

We want you to be happy with the quality of works we intend to carry out.

If you are therefore dissatisfied with any aspect of the works, please  
complete the section below and return it to us at:

«Contact Name»  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3  
Address\_Line\_4  
Postcode

It is important that you contact us at the earliest possible opportunity so the  
matter can be investigated promptly.

Scheme: Scheme ref  
Works: insert description of works

Works Ref: «works ref»  
Name: Name  
Address: «Property Address»

Comments	Location	Date of Observation

Name (please print):

Signed:

Contact Telephone Number:

This will only be used if we need to contact you for clarification.

Date:



## *Section 20 Consultation Explained*

### **Introduction**

Consultation around costs which affect Leaseholders can be a complicated subject. We have written this guidance in order to give you a better understanding of the legislation involved and processes Tamworth BC follows in order to carry out work or enter into long-term agreements with contractors.

Most properties will, at some point, need more than day-to-day maintenance work in order to remain in good condition. Some Leases will define exactly what Tamworth's obligations are in relation to carrying out 'major work' but in other circumstances Tamworth will make an informed decision on whether this work is required, which may involve third party consultants' professional opinions and recommendations.

### **What do you mean by 'Major Works'?**

We define Major Works as repair work which could not be accurately described as day-to-day maintenance and which would cost any one leaseholder more than the statutory threshold of £250. Examples could include the replacement of common parts lighting, re-decoration of internal common parts or a replacement roof.

### **What is Section 20?**

Section 20 is a specific part of housing law, namely, Section 20 of the Landlord & Tenant Act 1985 (amended by section 151 of the Commonhold & Leasehold Reform Act 2002). Under the terms of your lease, you must pay towards the cost of services or work to the building your home is in or the estate it is on. You do this by paying a service charge. Under Section 20, we must consult you about some of the work and services you must pay for.

### **What do you mean by 'Consultation' ?**

Tamworth BC is committed to involving our leaseholders in every stage of works which may affect their home. The consultation process is an invaluable opportunity to provide a two-way dialogue, which allows us to keep you informed of our plans, timescales and the costs involved in any work.

As well as the formal consultation under Section 20 that we are required to carry out, we aim to ensure you are involved in the following key stages:

- When the works are first planned
- Before the works start
- While the works are in progress
- When the works have been completed

### **When is Tamworth BC required to consult with me about work under Section 20?**

We must consult with leaseholders when one, or more, of the following conditions are met:

- If we plan to carry out work which will cost any one leaseholder more than £250. This includes repairs and maintenance to your building and estate.
- If we plan to enter into a long-term agreement (for more than 12 months) with outside contractors for work, supplies or services which will cost any

one leaseholder more than £100 a year. Examples include servicing contracts, responsive repairs contracts, planned maintenance contracts.

- If we plan to carry out work under a long-term agreement where the work will cost any one leaseholder more than £250.

### **How can I take part in the consultation?**

The consultation notices will contain information about what we plan to do, why it is necessary and also give you the opportunity to send us written comments about the proposals within 30 days. We must carefully consider any observations we receive from leaseholders during the consultation period and respond within 21 days.

### **How are leaseholders consulted about work Tamworth BC wishes to do under a long-term agreement ?**

We will carry out work or provide a service that is covered under a long-term agreement with a contractor, for example day-to-day repairs, planned maintenance works. We will have consulted with you about the original agreement, perhaps some years ago, but we must consult with you again if we are going to do work using a long-term agreement. You will be able to comment on the work but you will not be able to nominate a contractor because we have already chosen one.

### **Does Tamworth BC have any long-term agreements in place currently?**

Yes, we have a long-term agreement for planned maintenance works with the Wates Group and one with Engie for day-to-day repairs, which includes those to communal areas. These agreements are for 10 years and started on 1<sup>st</sup> April 2020. We consulted with you on the agreements in 2019.

If we are intending to do work under either of these agreements, that will cost any one leaseholder more than £250, we will always consult with you on specific works planned.

### **Why are you doing such large contracts - couldn't you just consult my individual building?**

Procuring individual works contracts causes delays and can add substantial costs. It also brings greater uncertainty on tender rates in a changing market. These long-term agreements should allow us to better use our purchasing power to secure more competitive rates and provide greater cost certainty and stability over time.

### **Can I nominate my own contractor?**

In some circumstances you will have the right to nominate a contractor to tender for the works. This does not apply to in cases where we have to advertise contracts by way of public notice. We will advise you in the relevant notice if you are able to nominate a contractor.

We will try to obtain a quote from a nominated contractor. However, it should be noted that we will need proposed contractors to meet certain requirements before being considered. The nominated contractor should be able to provide evidence of public liability insurance, a valid tax exemption certificate, confirmation of VAT status, and copies of their health and safety policy. We may also ask for evidence of experience carrying out similar kinds of work and references. In some cases, we may also need to assess credit records.

**What is a 'public notice'?**

Sometimes the value of a contract, we intend to enter into, will exceed the set procurement threshold of £5,372,609 for Works or £214,904 for Supplies and Services. In this circumstance Tamworth must issue a public notice, which allows tenders to be invited from contractors from across the UK.

**What is a 'Notice of Intention'?**

This is a formal letter which we send to you, which specifically outlines the nature of the work or service we plan to carry out. Once a 30 day consultation period has expired a 'Notice of Estimate' or 'Notice of Proposal' (in the case of services, rather than works) is sent to you outlining what costs we expect in relation to the work.

**What is a 'Notice of Estimate' or 'Notice of Proposal' ?**

This is a formal letter which sets out the details of the winning and second place contractors/service providers, details of the works/services as well as estimated costs.

**How long will consultation take?**

There are a few different scenarios which can be followed which relate to the four schedules for differing Section 20 Consultation processes and it will depend to some extent, which route Tamworth is taking, but in general a typical consultation process may take around three to four months.

**What happens if Tamworth BC doesn't consult with its leaseholders?**

If we do not follow the regulations, we are limited to how much we can charge you for the work or service. Currently, the limits are £250 per item of repair works and £100 for services that we provide under a long-term agreement. In certain circumstances, we can apply to the First tier Tribunal (FtT) for 'dispensation'. If the FtT give us dispensation, we would not have to follow the rules fully. However, we would have to satisfy the FtT that we had taken all reasonable steps to make leaseholders aware of our plans or that the situation was an emergency.

**Where can I get further independent advice?**

There are many reliable and accurate resources available online. The Leasehold Advisory Service (LEASE) and Citizens Advice both provide independent advice. LEASE is an independent organisation set-up by Government to provide impartial advice and around matters concerning Leaseholders (<http://www.leaseadvice.org/>).

If you prefer to talk to someone in person you may like to visit your local Citizens Advice Centre.

**Appendix H**  
**Stage 3 - Award of contract - long-term agreement**

Name  
Address  
Address  
Address  
Postcode

DATE

Dear «Name»

**LANDLORD'S NOTICE OF REASONS FOR MAKING A LONG-TERM AGREEMENT**  
Statutory Instrument 2003 No.1987 of the Commonhold and Leasehold Reform Act 2002

Works ref	Scheme ref	Property Ref	Property Address
«works ref»	«Scheme ref»	«Property Ref»	«Property Address»

This notice is given following the consultation with leaseholders on a notice of proposals to enter into a long-term agreement issued on (insert date of notice of proposals). The consultation period in respect of the notice of proposals ended on (insert relevant date).

We have now entered into an agreement for provision of the (insert description of the goods/services/works) first described in the notice of intention dated (insert date of notice of intention) with (name of chosen contractor).

Our reasons for doing so are (state reasons) (see Note 1 below)

or

A statement of our reasons for doing so may be inspected at (specify place and hours for inspection) (see Notes 1 and 2 below)

We did not receive within the consultation period any written observations in relation to the notice of proposals given on (insert date of notice of proposals) (see Note 3 below)

The written observations in relation to the proposals received during the consultation period may be summarised as follows: (insert summary of observations). Our response to the observations is (state response) (see Note 3 below)

or

A summary of the written observations received during the consultation period, together with our response to them may be inspected at (specify place and hours for inspection) (see Notes 2 and 3 below)

## Appendix H

### Stage 3 - Award of contract - long-term agreement

I attach for your information a leaflet which gives you more information on the Section 20 consultation process and explains the payment options available to you when you are invoiced for works carried out.

I hope this information is useful but if you require any further clarification, please do not hesitate to contact insert name on «telephone number».

Yours sincerely,

«insert name»  
insert job title

Please Note:

- 1) If you are not the legal owner of this property, please forward this Notice to them as soon as possible - Leaseholders only.
- 2) If you are in the process of selling your home, you should give a copy of this Notice to the prospective purchaser - Leaseholders only.
- 3) This notice is issued pursuant to s20 of the Landlord and Tenant Act 1985 (as amended by, but not limited to the Landlord and Tenant Act 1987 and the Commonhold and Leasehold Reform Act 2002).

Notes

1. Landlords do not need to send out this notice of reasons and summary/responses if:
  - a. the chosen contractor was nominated by a leaseholder, or
  - b. the chosen contractor was the person who submitted the lowest estimate.
2. Where a notice specifies a place and hours for inspection:
  - a. the place and hours so specified must be reasonable; and
  - b. copies of the documents must be available for inspection, free of charge, at that place and during those hours. If facilities to enable copies to be taken are not made available and at the times at which the documents may be inspected, the landlord shall provide to any leaseholder, on request and free of charge, a copy of the documents.
3. Where a landlord has received written observations within a consultation period in relation to a notice of proposals to enter into a long-term agreement,

## **Appendix H**

### **Stage 3 - Award of contract - long-term agreement**

he is required to summarise the observations and respond to them within a notice of his reasons for making the agreement or specify the place and hours at which that summary and response may be inspected.

Appendix F Long Term Qualifying Agreement - Notice of Intention

Name  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3  
Address\_Line\_4  
Postcode

DATE

Dear «Name»

LANDLORD’S NOTICE OF INTENT TO ENTER INTO A CONTRACT FOR A  
QUALIFYING LONG-TERM AGREEMENT FOR SERVICES  
Statutory Instrument 2003 No.1987 of the Commonhold and Leasehold Reform Act 2002

Works ref	Scheme ref	Property Ref	Property Address
«works ref»	«Scheme ref»	«Property Ref»	«Property Address»

I am writing to inform you that Tamworth BC intends to enter into an agreement for services that relate to the building and/or estate (if applicable) that your property forms a part:

«insert description of /services»

These services are considered necessary for the following reason/s:

«insert reason for the /services»

As the proposed services affect the building or estate that your property forms a part and under the terms of your lease, or tenancy agreement you have an obligation to contribute towards the cost of these services, you have the right to tell us what you think of the proposal. If you do have any observations, you should submit these in writing to the address below.

«Contact Name»  
Address\_Line\_1  
Address\_Line\_2

Please note that this is the first stage of consultation and estimates for these services will not be known until the contract is tendered. You will be notified of your individual estimated contribution during the second phase of consultation.

You also have the right to nominate a person or organisation that you would like us to approach for a tender. Please note that any nominated contractor that we approach may be rejected if they do not meet the reasonable requirements of Tamworth BC's Procurement Policy which include:

The contractor should be able to provide evidence of public liability insurance, a valid tax exemption certificate, confirmation of VAT status, and copies of their health and safety policy. We may also ask for evidence of experience carrying out similar kinds of work and references. In some cases, we may also need to assess credit records.

All comments, observations and or nominations must be received within 30 days from the date of this notice. Please note that the consultation period will end on S20\_30\_Day\_Expiration.

I attach for your information a leaflet which gives you more information on the Section 20 consultation process and explains the payment options available to you when you are invoiced for works carried out.

I hope this information is useful but if you require any further clarification, please do not hesitate to contact insert name on «telephone number».

Yours sincerely,

«insert name»  
insert job title

Please Note:

- 1) If you are not the legal owner of this property, please forward this Notice to them as soon as possible - Leaseholders only.
- 2) If you are in the process of selling your home, you should give a copy of this Notice to the prospective purchaser - Leaseholders only.
- 3) This notice is issued pursuant to s20 of the Landlord and Tenant Act 1985 (as amended by, but not limited to the Landlord and Tenant Act 1987 and the Commonhold and Leasehold Reform Act 2002).



# Comments, Observations & Nominations Form

THIS FORM RELATES TO PROPOSED WORKS/SERVICES AND SHOULD BE RETURNED BEFORE THE END OF THE CONSULTATION PERIOD.

The consultation period for the proposed works ends on S20\_30\_Day\_Expiration. If you would like to make any comments or observations about the work, please complete the section below and return it to us at:

«Contact Name»  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3  
Address\_Line\_4  
Postcode

Any comments or observations must reach us by S20\_30\_Day\_Expiration to be considered.

Scheme: «Scheme ref»  
Works: «insert description of works»

Works Ref: «works ref»  
Name: Name  
Address: «Property Address»

Comments/Observations

--

IF YOU NEED TO, PLEASE CONTINUE ON A SEPARATE SHEET OF PAPER

I would like to nominate a Contractor to bid for this work. The name and full address of the Company/person is:

--

Name (please print):

Signed:

Contact Telephone Number:

Date:

## Appendix E - Notification of Proposed Contract - Qualifying Works where Public Notice required

NAME  
ADDRESS  
ADDRESS  
ADDRESS  
POSTCODE

DATE

Dear «Name»

### LANDLORD'S PROPOSAL TO ENTER INTO A CONTRACT FOR QUALIFYING WORKS

Statutory Instrument 2003 No.1987 of the Commonhold and Leasehold Reform Act 2002

Works ref	Scheme ref	Property Ref	Property Address
«works ref»	«Scheme ref»	«Property Ref»	«Property Address»

I am writing to inform you further to our letter of (insert date) that we intend to enter into an agreement for the following works that relate to the building and/or estate (if applicable) that your property forms a part. The consultation period in respect of the notice of intention ended on (insert date):

«insert description of works»

These works are considered necessary for the following reason/s:

«insert reason for the works»

We have now obtained estimates for these works. We approached No\_of\_Contractors\_Approached contractors to provide tenders and received No\_of\_Estimates\_Returned returns. We have shortlisted **two** contractors and enclose details, as required by law, on the attached Statement of Estimates. This includes your estimated contribution towards the work.

We currently propose to select **Tender A**.

You can view the actual estimates and any supporting documentation at this office. If this isn't too large, we are happy, on request, to send you a copy. If this isn't practical, or you would like to see further evidence of the supporting documentation, you can make an appointment to inspect the priced specification, the estimates and all relevant documentation at this office from Monday to Friday between the hours of 9am-5pm. If you would like to arrange an appointment, please contact «insert name» beforehand on «telephone number».

## **Appendix E - Notification of Proposed Contract - Qualifying Works where Public Notice required**

Please note that this is not a demand for payment. An invoice for these works will only be produced on practical completion of these works.

Below is a summary of the written observations received during the consultation period of the Landlords Notice of Intent and a summary of our response.

No written observations were received during the consultation period.

I attach for your information a leaflet which gives you more information on the Section 20 consultation process and explains the payment options available to you when you are invoiced for works carried out.

I hope this is clear but if you require any further clarification, please do not hesitate to contact insert name on «telephone number».

Yours sincerely,

«insert name»  
insert job title

Please Note:

- 1) If you are not the legal owner of this property, please forward this Notice to them as soon as possible.
- 2) If you are in the process of selling your home, you should give a copy of this Notice to the prospective purchaser.
- 3) This notice is issued pursuant to s20 of the Landlord and Tenant Act 1985 (as amended by, but not limited to the Landlord and Tenant Act 1987 and the Commonhold and Leasehold Reform Act 2002).

**Appendix E - Notification of Proposed Contract - Qualifying Works  
where Public Notice required**

**Appendix E - Notification of Proposed Contract - Qualifying Works  
where Public Notice required**

**STATEMENT OF ESTIMATE**

This Statement of Estimates provides detail of the two estimates short-listed from the tenders received. We presently propose to accept «Contractor A» as we believe that contractor offers the best value for money. We are unaware of any relationship as defined by SI 2003 No1987 Schedule 1 (5) (5) between the proposed contractor and members of Tamworth BC or its subsidiaries.

Your proportion of costs is calculated by distinguishing the amount rechargeable to your block and apportioning costs using the formula laid down in your lease agreement. Under the terms of your lease, you will be required to contribute approximately Percentage% towards these costs. Your contribution is also subject to a «10%» management fee.

**TENDER A**

CONTRACTOR: Name of Contractor A of Address  
CONTRACT COST: £Value of Tender A inclusive of VAT  
CONSULTANT: Name of Consultant  
CONSULTANT'S RATE: £Professional fees inclusive of VAT  
CONTRACT COST (INCL): £Total Value of Tender A including Professional fees inclusive of VAT

Estimated cost of work to your block

Estimated Cost to Block: £Tender A Block Cost  
Estimated Cost to Block (incl): £Tender A Block Cost including Professional Fees  
Your total estimated cost: £Estimate A including Professional fees inclusive of VAT

Your estimated contribution (including management fee at 10 per cent management fee)

**£Estimate A including Professional Fees and Management Fee**

## **Appendix E - Notification of Proposed Contract - Qualifying Works where Public Notice required**

### **TENDER B**

CONTRACTOR: Name of Contractor B of Address  
CONTRACT COST: £Value of Tender B inclusive of VAT  
CONSULTANT: Name of Consultant  
CONSULTANT'S RATE: £Professional fees inclusive of VAT  
CONTRACT COST (INCL): £Total Value of Tender B including Professional fees inclusive of VAT

Estimated cost of work to your block

Estimated Cost to Block: £Tender B Block Cost  
Estimated Cost to Block (incl): £Tender B Block Cost including Professional Fees  
Your total estimated cost: £Estimate B including Professional fees inclusive of VAT

Your estimated contribution (including management fee at 10 per cent management fee)

**£Estimate B including Professional Fees and Management Fee**

**Appendix E - Notification of Proposed Contract - Qualifying Works where Public Notice required**

Delete if not applicable Please note that as you are within the initial or reference period of your purchases under the Right to Buy or Right to Acquire scheme your contribution for these works is < S125\_Cap\_ >



## **Appendix E - Notification of Proposed Contract - Qualifying Works where Public Notice required**

### **Payment Options**

It is recognised that charges arising from works can cause hardship and, although you are not required to pay anything on the enclosed estimate, an invoice will be sent to you once the works have been completed. If you contribute to a reserve or provision (sinking fund) for these types of works your payment amount will be reduced by that amount.

The invoice will be payable within 28 days therefore important that you begin to consider how you will finance your share of the costs. If you believe that you will not have sufficient funds to pay the invoice when it is sent the following options may be of assistance to you:

- 1) You could consider setting up a savings account in the interim that you can make regular payments into and those savings would normally earn you interest.
- 2) If you have a mortgage from a Building Society or Bank, you can approach them to extend your mortgage to cover the cost of the works.
- 3) You may want to investigate whether you can secure a loan with a lower rate of interest from a reputable external provider.
- 4) If you are on a low income (whether you are already in receipt of benefits or not), the charge may sufficiently increase your housing costs to qualify you for further assistance.

You will be sent the telephone numbers of those agencies that may be able to assist in assessing your situation when you are sent your invoice.

#### **Are you in debt and in need of advice?**

For basic advice on debt, please contact insert name.

For specialist independent debt advice, you can call the National Debt helpline free on 0808 808 4000 Monday to Friday 9am to 9pm and Saturday 9.30am to 1pm. Or visit [www.nationaldebtline.co.uk](http://www.nationaldebtline.co.uk)

The National Debt line is a national telephone help line for people with debt problems. The service is free, confidential and independent. The service provides self-help advice to its callers and also produces booklets and fact sheets on managing debt. The service can also help callers with Debt Management Plans



**Appendix E - Notification of Proposed Contract - Qualifying Works  
where Public Notice required**

Name (please print):

Signed:

Contact Telephone Number:

Date:

**Appendix E - Notification of Proposed Contract - Qualifying Works  
where Public Notice required**

**Quality of Works Feedback Form**

THIS FORM RELATES TO ONGOING WORKS AND SHOULD NOT BE  
RETURNED BEFORE THE WORKS COMMENCE.

We want you to be happy with the quality of works we intend to carry out.

If you are therefore dissatisfied with any aspect of the works, please complete the section below and return it to us at:

«Contact Name»  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3  
Address\_Line\_4  
Postcode

It is important that you contact us at the earliest possible opportunity so the matter can be investigated promptly.

Scheme: Scheme ref  
Works: insert description of works

Works Ref: «works ref»  
Name: Name  
Address: «Property Address»

Comments	Location	Date of Observation

**Appendix E - Notification of Proposed Contract - Qualifying Works where Public Notice required**

Name (please print):

Signed:

Contact Telephone Number:

This will only be used if we need to contact you for clarification.

Date:

## Appendix G - Qualifying LTA or Works - Notification of Proposals

Name  
or the Current Homeowner  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3  
Address\_Line\_4  
Postcode

DATE

Dear (name)

LANDLORD'S PROPOSAL TO ENTER INTO A CONTRACT FOR A QUALIFYING  
LONG-TERM AGREEMENT FOR WORKS/SERVICES  
Statutory Instrument 2003 No.1987 of the Commonhold and Leasehold Reform Act 2002

Works ref	Scheme ref	Property Ref	Property Address
«works ref»	«Scheme ref»	«Property Ref»	«Property Address»

I am writing to inform you further to our letter of insert date that subject to your observations we intend to enter into an agreement for the following works/services that relate to the building and/or estate (if applicable) that your property forms a part:

«insert description of works/services»

These works/services are considered necessary for the following reason/s:

«insert reason for the works»

We have now obtained estimates for these works/services. We approached No\_of\_Contractors\_Approached contractors to provide tenders and received No\_of\_Estimates\_Returned returns. We have shortlisted two contractors and enclose details, as required by law, on the attached Statement of Estimates. This includes your estimated contribution towards the work.

We currently propose to select Tender A.

**This Notice is the second stage in the process and does not mean that any works are due to take place on your building imminently. This process is to put in place the contracts which will allow us to deliver our (insert description of contract here i.e. major and planned works) in the future, as part of our planned investment programme.**

**At the point we identify any works that are required to your building, there will be a further consultation notice when the**

**programme is agreed, prior to commencement of any works (where the cost to you of the works would exceed the relevant threshold - currently £250). This will provide details of the proposed works and the estimated costs and you will again be invited to submit observations before the works are carried out.**

«Contact Name»  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3  
Address\_Line\_4  
Postcode

As the proposed works affect the building that your property forms a part, you have the right to tell us what you think of the proposal. If you do have any observations, you should submit these in writing to the address below.

All comments and observations must be received within 30 days from the date of this notice. Please note that the consultation period will end on S20\_30\_Day\_Expiration.

### **TENDER A**

CONTRACTOR: Name of Contractor A of Address  
CONTRACT COST: £Value of Tender A inclusive of VAT  
CONSULTANT: Name of Consultant  
CONSULTANT'S RATE: £Professional fees inclusive of VAT  
CONTRACT COST (INCL): £Total Value of Tender A including Professional fees inclusive of VAT

Estimated cost of work to your block

Estimated Cost to Block: £Tender A Block Cost  
Estimated Cost to Block (incl): £Tender A Block Cost including Professional Fees  
Your total estimated cost: £Estimate A including Professional fees inclusive of VAT

Your estimated contribution (including management fee at 10 per cent management fee)

**£Estimate A including Professional Fees and Management Fee**

## **TENDER B**

CONTRACTOR: Name of Contractor B of Address

CONTRACT COST: £Value of Tender B inclusive of VAT

CONSULTANT: Name of Consultant

CONSULTANT'S RATE: £Professional fees inclusive of VAT

CONTRACT COST (INCL): £Total Value of Tender B including Professional fees inclusive of VAT

Estimated cost of work to your block

Estimated Cost to Block: £Tender B Block Cost

Estimated Cost to Block (incl): £Tender B Block Cost including Professional Fees

Your total estimated cost: £Estimate B including Professional fees inclusive of VAT

Your estimated contribution (including management fee at 10 per cent management fee)

### **£Estimate B including Professional Fees and Management Fee**

You can view the actual estimates and any supporting documentation at this office. If this isn't too large, we are happy, on request, to send you a copy. If this isn't practical, or you would like to see further evidence of the supporting documentation, you can make an appointment to inspect the priced specification, the estimates and all relevant documentation at this office from Monday to Friday between the hours of 9am-5pm. If you would like to arrange an appointment, please contact «insert name» beforehand on «telephone number».

Please note that this is not a demand for payment. An invoice for these works will only be produced on practical completion of these works.



Below is a summary of the written observations received during the consultation period of the Landlords Notice of Intent and a summary of our response.

No written observations were received during the consultation period.

I attach for your information a leaflet which gives you more information on the Section 20 consultation process and explains the payment options available to you when you are invoiced for works carried out.

I hope this is clear but if you require any further clarification, please do not hesitate to contact insert name on «telephone number».

Yours sincerely,

«insert name»  
insert job title

Please Note:

- 1) If you are not the legal owner of this property, please forward this Notice to them as soon as possible.
- 2) If you are in the process of selling your home, you should give a copy of this Notice to the prospective purchaser.
- 3) This notice is issued pursuant to s20 of the Landlord and Tenant Act 1985 (as amended by, but not limited to the Landlord and Tenant Act 1987 and the Commonhold and Leasehold Reform Act 2002).

## STATEMENT OF ESTIMATE

This Statement of Estimates provides detail of the two estimates short-listed from the tenders received. We presently propose to accept «Contractor A» as we believe that contractor offers the best value for money. We are unaware of any relationship as defined by SI 2003 No1987 Schedule 1 (5) (5) between the proposed contractor and members of Tamworth BC or its subsidiaries.

Your proportion of costs is calculated by distinguishing the amount rechargeable to your block and apportioning costs using the formula laid down in your lease agreement. Under the terms of your lease, you will be required to contribute approximately Percentage% towards these costs. Your contribution is also subject to a «10%» management fee.

Delete if not applicable Please note that as you are within the initial or reference period of your purchases under the Right to Buy or Right to Acquire scheme your contribution for these works is « S125\_Cap\_»

## Payment Options

It is recognised that charges arising from works can cause hardship and, although you are not required to pay anything on the enclosed estimate, an invoice will be sent to you once the works have been completed.

The invoice will be payable within 28 days therefore it is important that you begin to consider how you will finance your share of the costs. If you believe that you will not have sufficient funds to pay the invoice when it is sent the following options may be of assistance to you:

- 1) You could consider setting up a savings account in the interim that you can make regular payments into and those savings would normally earn you interest.
- 2) If you have a mortgage from a Building Society or Bank, you can approach them to extend your mortgage to cover the cost of the works.
- 3) You may want to investigate whether you can secure a loan with a lower rate of interest from a reputable external provider.
- 4) If you are on a low income (whether you are already in receipt of benefits or not), the charge may sufficiently increase your housing costs to qualify you for further assistance.
- 5) Leaseholders who have exercised their Right to Buy as a secure tenant within the last 10 years may have the Right to a Loan from their Local Authority under s450(A) of the Housing Act 1985 (as amended). It is only available for service charges relating to repairs, renewal and maintenance and if the demand is for more than £1,500 (value as at 1992, which is updated annually for inflation).

You will be sent the telephone numbers of those agencies that may be able to assist in assessing your situation when you are sent your invoice.

### Are you in debt and in need of advice?

For basic advice on debt, please contact insert name.

For specialist independent debt advice, you can call the National Debt helpline free on 0808 808 4000 Monday to Friday 9am to 9pm and Saturday 9.30am to 1pm. Or visit [www.nationaldebtline.co.uk](http://www.nationaldebtline.co.uk)

The National Debt line is a national telephone help line for people with debt problems. The service is free, confidential and independent. The service provides self-help advice to its callers and also produces booklets and fact sheets on managing debt. The service can also help callers with Debt Management Plans



Name (please print):

Signed:

Contact Telephone Number:

Date:

# Quality of Works Feedback Form

THIS FORM RELATES TO ONGOING WORKS AND SHOULD NOT BE  
RETURNED BEFORE THE WORKS COMMENCE.

We want you to be happy with the quality of works we intend to carry out.

If you are therefore dissatisfied with any aspect of the works, please  
complete the section below and return it to us at:

«Contact Name»  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3  
Address\_Line\_4  
Postcode

It is important that you contact us at the earliest possible opportunity so the  
matter can be investigated promptly.

Scheme: Scheme ref  
Works: insert description of works

Works Ref: «works ref»  
Name: Name  
Address: «Property Address»

Comments	Location	Date of Observation

Name (please print):

Signed:

Contact Telephone Number:

This will only be used if we need to contact you for clarification.

Date:



## Appendix K - Notice of Intention - Qualifying Works under a Qualifying Long-Term Agreement

NAME  
ADDRESS  
ADDRESS  
ADDRESS  
POSTCODE

DATE

Dear «Name» (name of leaseholder/name of recognised tenants' association)

LANDLORD'S NOTICE OF INTENT TO ENTER INTO A CONTRACT FOR A  
QUALIFYING WORKS UNDER A QUALIFYING LONG-TERM AGREEMENT  
Statutory Instrument 2003 No.1987 of the Commonhold and Leasehold Reform Act 2002

Works ref	Scheme ref	Property Ref	Property Address
«works ref»	«Scheme ref»	«Property Ref»	«Property Address»

I am writing to inform you that Tamworth BC intends to carry out works under an existing long-term agreement previously consulted upon with **insert name of contractor**. The works relate to the building and/or estate (if applicable) that your property forms a part and we are required to consult with you on these works:

**insert description of the works**

These works are considered necessary for the following reason/s:

**insert reason for the works**

We estimate the total amount of expenditure likely to be incurred on or in connection with the proposed works is **insert estimated figure**.

As the proposed services affect the building or estate that your property forms a part and under the terms of your lease, you have an obligation to contribute towards the cost of these services, you have the right to tell us what you think of the proposal. If you do have any observations, you should submit these in writing to the address below.

All comments, observations and or nominations must be received within 30 days from the date of this notice. Please note that the consultation period will end on S20\_30\_Day\_Expiration.

## **Appendix K - Notice of Intention - Qualifying Works under a Qualifying Long-Term Agreement**

I attach for your information a leaflet which gives you more information on the Section 20 consultation process and explains the payment options available to you when you are invoiced for works carried out.

I hope this information is clear but if you require any further clarification, please do not hesitate to contact insert name on «telephone number».

Yours sincerely,

«insert name»  
insert job title

Please Note:

- 1) If you are not the legal owner of this property, please forward this Notice to them as soon as possible - Leaseholders only.
- 2) If you are in the process of selling your home, you should give a copy of this Notice to the prospective purchaser - Leaseholders only.
- 3) This notice is issued pursuant to s20 of the Landlord and Tenant Act 1985 (as amended by, but not limited to the Landlord and Tenant Act 1987 and the Commonhold and Leasehold Reform Act 2002).

Notes

- 1) Section 20 of the Landlord and Tenant Act 1985 (as amended) provides that a landlord must consult leaseholders who are required under the terms of their leases to contribute to costs incurred under qualifying works, where the contribution of any one leaseholder will exceed £250.
- 2) Where a notice specifies a place and hours for inspection:
  - a. the place and hours so specified must be reasonable; and
  - b. a description of the proposed works must be available for inspection, free of charge, at that place and during those hours. If facilities to enable copies to be taken are not made available at the times at which the description may be inspected, the landlord shall provide to any leaseholder, on request and free of charge, a copy of the description.
- 3) The landlord has a duty to have regard to written observations made within the consultation period by any leaseholder or recognised tenants' association. 'Recognised tenants' association' is defined by Section 29 of the 1985 Act.

## Appendix K - Notice of Intention - Qualifying Works under a Qualifying Long-Term Agreement

### Comments & Observations Form

THIS FORM RELATES TO PROPOSED WORKS/SERVICES AND SHOULD BE RETURNED BEFORE THE END OF THE CONSULTATION PERIOD.

The consultation period for the proposed works ends on S20\_30\_Day\_Expiration. If you would like to make any comments or observations about the work, please complete the section below and return it to us at:

«Contact Name»  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3  
Address\_Line\_4  
Postcode

Any comments or observations must reach us by S20\_30\_Day\_Expiration to be considered.

Scheme: «Scheme ref»  
Works: «insert description of works»

Works Ref: «works ref»  
Name: Name  
Address: «Property Address»

Comments/Observations

**Appendix K - Notice of Intention - Qualifying Works under a Qualifying Long-Term Agreement**

IF YOU NEED TO, PLEASE CONTINUE ON A SEPARATE SHEET OF PAPER

Name (please print):

Signed:

Contact Telephone Number:

Date:

Appendix I - Qualifying LTA or Works - Pre Tender Consultation where Public Notice is required

Name  
of the Current Homeowner  
Address\_Line\_1  
Address\_Line\_2  
Address\_Line\_3  
Address\_Line\_4  
Postcode

DATE

Dear «Name»

LANDLORD'S NOTICE OF INTENT TO ENTER INTO A CONTRACT FOR A  
QUALIFYING LONG-TERM AGREEMENT FOR WORKS/SERVICES  
Statutory Instrument 2003 No.1987 of the Commonhold and Leasehold Reform Act 2002

Works ref	Scheme ref	Property Ref	Property Address
«works ref»	«Scheme ref»	«Property Ref»	«Property Address»

I am writing to inform you that Tamworth BC intends to enter into an agreement for works/services that relate to the building and/or estate (if applicable) that your property forms a part:

«insert description of works/services»

These works/services are considered necessary for the following reason/s:

«insert reason for the works »

As the proposed works affect the building or estate that your property forms a part and under the terms of your lease you have an obligation to contribute towards the cost of these works or services, you have the right to tell us what you think of the proposal. If you do have any observations, you should submit these in writing to the address below.

**Please note that this is the first stage of consultation and estimates for these works will not be known until the contract is tendered. You will be notified of the details of the cost proposals received from contractors that have tendered for the work during the second phase of consultation.**

You do not have the right to nominate a person or organisation for us to approach for a tender as the value of this contract is above limits that under UK legislation require us to advertise the contract using the Find A Tender service.

All comments and observations must be received within 30 days from the date of this notice. Please note that the consultation period will end on S20\_30\_Day\_Expiration.

Please find enclosed a leaflet that gives you more information on the Section 20 Consultation process. I hope this is helpful but if you require any further clarification, please do not hesitate to contact insert name on «telephone number».

Yours sincerely,

«insert name»  
insert job title

Please Note:

- 1) If you are not the legal owner of this property, please forward this Notice to them as soon as possible.
- 2) If you are in the process of selling your home, you should give a copy of this Notice to the prospective purchaser.
- 3) This notice is issued pursuant to s20 of the Landlord and Tenant Act 1985 (as amended by, but not limited to the Landlord and Tenant Act 1987 and the Commonhold and Leasehold Reform Act 2002).



Name (please print):

Signed:

Contact Telephone Number:

Date: