

## **All You Want To Know About Welsh Housing Association Finance 2010**

**October 2010**

Welsh Housing Associations provide 114,000 affordable homes to rent or buy and are the main providers of new social housing. Some local authorities have transferred their council housing to new Housing Associations while others are considering doing so. Housing Associations employ 4,000 people and are managed by Boards that are comprised of volunteers and over 25% are tenants. They are making a major contribution to improving and managing social housing and to community and economic regeneration. Their financial arrangements are becoming increasingly complex. But are their finances always well understood by Board Members or Managers?

Do you think that a working knowledge of housing association finance would put you and your colleagues in a position of advantage?

Whether you are a Housing Manager, Tenant Representative, Board Member, or even a member of the Finance Team; whether you are in an established Housing Association, a Local Authority carrying out a Stock Transfer, in a Council that has partnerships with Housing Associations or are otherwise concerned with Housing Associations in Wales, you could benefit from one of our courses at which you will learn:

### **“All You Want To Know About Welsh Housing Association Finance 2010”**

#### **What the Course will include:**

- Income and Expenditure Accounts, Cash Flow Statements, Balance Sheets
- Financial and Regulatory Framework of Housing Associations
- Board and Executive responsibilities for finance
- Capital Finance and Development and sources of Capital Finance
- Social Housing Grant and Social Housing Management Grant
- Business and Financial Planning and Thirty-year Forecasts
- The Efficiency Agenda – Procurement and E-Technology
- Community Mutual Housing Associations and the financing of Stock Transfers
- The effects of the recession and the government's deficit reduction plan on Welsh Housing Associations

Delegates will gain an overview of the finances of Welsh Housing Associations and will keep up to date with developments in housing association finance.

The course is accompanied by a very useful booklet entitled:

### **“All You Want To Know About Welsh Housing Association Finance 2010”**

#### **Venue and Date**

**Cardiff:** Novotel Cardiff Central Hotel, Schooner Way – Tuesday 5<sup>th</sup> October 2010

Shire Hall, The Sands, Appleby in Westmorland, Cumbria. CA16 6QH.

Telephone: 017683-52165. Mobile: 07502-142658. Fax: 017683-54005.

E-Mail: [Adrian.waite@awics.co.uk](mailto:Adrian.waite@awics.co.uk). Websites: [www.awics.co.uk](http://www.awics.co.uk) and [www.awics.eu](http://www.awics.eu)

Managing Director: Adrian Waite MA CPFA ACIH FIPSM  
Company Number: 3713554. VAT Registration Number: 721 9669 13

## **The Programme**

- 10.00 Introduction and Revenue Issues: Financial Structure, Financial Aims and Objectives, Government Funding, Sources of Finance, Financial Growth, Regulation and Governance, Income and Expenditure Accounts, Cash Flow Statements.
- 11.00 BREAK
- 11.15 Capital Issues: Balance Sheets, Capital Expenditure, Welsh Housing Quality Standard, Community and Economic Regeneration, Sources of Capital Finance, Social Housing Grants, Loans, Capital Contributions, Use of Reserves, Capital Receipts, Treasury Management.
- 12.30 LUNCH
- 13.30 Social Housing Grant and the Efficiency Agenda: Development of Affordable Homes, Comprehensive Spending Reviews 2007 and 2010, Welsh Budgets, Gershon and Efficiency Targets, Regulatory Code, Partnering, Social Housing Grant Main Programme Allocations, Social Housing Management Grant.
- 14.30 BREAK
- 14.45 Business and Financial Planning and Stock Transfer: Business and Financial Planning, Thirty Year Financial Forecasts, Taxation, Pensions, Supporting People, Asset Management, Mergers, Flotation, Community Mutual Model, Stock Transfers, Tenanted Market Value, Future developments, Conclusions.
- 16.00 CLOSE

This seminar is designed for people who are not experts in housing association finance in Wales, but who need to understand the basics and achieve an overview of what is going on. It is suitable for housing managers, tenant representatives, board members and finance staff who have limited experience of the housing association finances and others who realise that an understanding of housing association finance can place them at an advantage!

This course is also available in-house. For further information about in-house courses, please contact Adrian Waite on 017683-52165 or 52347 or [Adrian.waite@awics.co.uk](mailto:Adrian.waite@awics.co.uk).

Please note that there are free briefing papers on housing finance posted on the 'AWICS' website at:

[www.awics.co.uk/BriefingPapers/ViewCategory/housing/](http://www.awics.co.uk/BriefingPapers/ViewCategory/housing/)



**Adrian Waite (Independent Consultancy Services) Limited**

**Our speaker **Adrian Waite** is well known for his in-depth knowledge of this subject and for his ability to present information clearly.**

Adrian Waite is Managing Director of 'Adrian Waite (Independent Consultancy Services) Limited'.

After graduating from Oxford University with a First Class Honours degree, Adrian joined West Yorkshire Metropolitan County Council as a Trainee Accountant, and became a qualified member of the Chartered Institute of Public Finance and Accountancy. He is also an Associate member of the Chartered Institute of Housing, an Honorary Fellow of the Institute of Public Services Management and Fellow of the Institute of Leadership & Management.

Appointments at Leeds City Council and Newcastle on Tyne City Council gave Adrian experience of the finance of every local government service. In 1990, he was appointed Assistant County Treasurer at Staffordshire County Council. As Finance Director, and then Strategic Director, at Copeland Borough Council between 1993 and 1998, Adrian became conversant with every aspect of the finance and strategic management of housing.

He left Copeland Council in 1998 to work as an Independent Consultant. Since then he has worked with central government, local authorities, housing associations and professional bodies throughout Britain and abroad on a variety of financial and strategic issues that affect social housing. He has worked with Fenland District Council and Circle Anglia Housing Association on the Fenland stock transfer. He is currently working with the Lambeth Alliance of Tenant Management Organisations (LATMOS) on their stock transfer. He is a member of the board of Impact Housing Association where he is resident involvement champion. He has provided training on housing finance in Wales. He sits on the National Council, Housing Panel and the Housing Technical Information Services Panel of the Chartered Institute of Public Finance and Accountancy. He is President of the Institute of Public Sector Management.

With experience to Strategic Director level in a Borough Council, as an advisor to central government and local government and as a board member of a housing association, Adrian has seen social housing finance issues from almost every point of view.

Adrian is known for his expert knowledge of financial and management issues that affect social housing and his ability to explain complex matters in a clear and understandable manner. He provides training and consultancy on all aspects of the finance and management of social housing.

### **About 'AWICS'**

'AWICS' provides a full range of ethical management consultancy and training services, principally to those who are involved in social housing. Our mission statement is 'Independence, Integrity, Value'. We therefore provide training from an independent standpoint that is designed to help the client to achieve their objectives. We are passionate about working with the utmost integrity. We believe that we offer the best value for money that is available today! And we publish the popular free e-newsletter for public services – the 'Public Services News'. We are big enough to make a difference – but are small enough to care!

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Telephone: 017683-52165. Mobile: 07502-142658. Fax: 017683-54005.  
E-Mail: [Adrian.waite@awics.co.uk](mailto:Adrian.waite@awics.co.uk). Websites: [www.awics.co.uk](http://www.awics.co.uk) and [www.awics.eu](http://www.awics.eu)**

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## All You Want To Know About Welsh Housing Association Finance 2010

### How to reserve your place

- **By Fax:** Fax us on 017683 54005
- **By post:** Complete this form and send it to:  
AWICS Ltd, Shire Hall, The Sands, Appleby in Westmorland, Cumbria. CA16 6QH.
- **On line:** You can download this form from [www.awics.co.uk/RegionalSeminars/ViewCourse/all\\_you\\_want\\_to\\_know\\_about\\_welsh\\_housing\\_association\\_finance\\_09](http://www.awics.co.uk/RegionalSeminars/ViewCourse/all_you_want_to_know_about_welsh_housing_association_finance_09), fill it in electronically and forward to: [seminars@awics.co.uk](mailto:seminars@awics.co.uk)
- **By Phone:** Please telephone us on 017683-52165.

**Do not send any payment:** We will confirm your booking and send an invoice.

### Delegate fees:

The cost of this seminar is £230 plus VAT making a total of £270.25. The fee includes lunch\* and booklet – 'All you Want to Know about Welsh Housing Association Finance 2010'

\* Please let us know if you have any special dietary requirements

Delegate Name                      Position and Department

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To enrol additional delegates, please photocopy this form.

Please state which venue and date you require \_\_\_\_\_

Name of person booking \_\_\_\_\_ Tel.No. \_\_\_\_\_

Dept and Organisation \_\_\_\_\_ Order No. \_\_\_\_\_

Full Address \_\_\_\_\_

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Post Code \_\_\_\_\_ E-mail address \_\_\_\_\_

Please advise us if you would like your invoice sending to a different address.

Please let us know if your delegate has any particular needs.

### Booking conditions:

**Cancellations and substitutions:** A full refund will be given up to 28 days before the seminar. There after a 50% refund up to 14 days before the seminar. We regret that no refund can be given 14 days or less before the seminar.

Cancellations must be made in writing or by email and be acknowledged by AWICS. No refund will be given for non-attendance, but delegates may substitute another delegate at any time.

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