



The
Property
Institute

**TRAINING &
QUALIFICATIONS
PROGRAMME**
AUTUMN/WINTER 2024



Lead the Way with TPI Training and Qualifications

Unlock your potential with our brand-new Autumn/Winter Training and Qualifications Brochure, carefully crafted to help property management professionals take the next step. Sharpen your skills with our extensive training programme or gain nationally recognised credentials with our prestigious qualifications.

All of TPI's courses and workshops are delivered by industry experts who provide practical insights from their daily work, ensuring you gain relevant and actionable knowledge to excel in your role.

No matter what your area of expertise is, our qualifications are tailored to meet your needs across three key pathways: Leasehold, Build to Rent, and Factoring.

Embark on our Leasehold Management pathway and progress through the levels to achieve the Ofqual-accredited Level 4 Certificate in Leasehold Management, granting you the right to use the designatory letters MTPI.

The Level 4 exam in Build to Rent (BTR) is also accredited by Ofqual, while our Factoring qualification is recognised on the Scottish Credit and Qualification Framework (SCQF).

Alternatively, choose from our wide range of training, covering all aspects of the sector from reading leases to complaints handling, and dealing with service charge accounts.

Our training courses also come with full CPD certification. We provide in-person and online courses, as well as in-house training specific to your firm's needs.

All TPI members, both individual and firm, receive the members price. Firm members can also benefit from our block booking offer: **Purchase 10 training credits and receive 20% off**. For any questions about our training or qualifications please contact: info@tpi.org.uk

All courses and qualifications are online unless stated otherwise.



PROPERTY MANAGEMENT

TC68: Heat Networks, Net Zero, Regulation and Management of Communal Heating in Apartment Blocks

Trainer: Rupert Mackay – Data Energy

Date: 4th September – 9:30am to 12:30pm – Online

This immersive 3-hour online session is essential for any PM managing a block with communal heating, hot water and /or CHP installed. Looking closely at the evolving energy landscape, this practical course will provide members with specific knowledge to ensure compliance under the Heat Network (Metering and Billing) Regulations.

BOOK HERE 

TC27: The Procedural and Technical Issues of Section 20

Trainer: Joe Mallon – JFM / Jackie Dickens – HQN

Dates:

10th and 11th September – 9:30am to 12:30pm

Joe Mallon: Online

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

Jackie Dickens: Online

A 6-hour online workshop (3 hours per session over 2 days) covering the requirements and procedures of Section 20 (Qualifying Works and Qualifying Long-term Agreements), dispensation, OJEU Public Notices and the growing body of case law.

BOOK HERE 

PROPERTY MANAGEMENT

TC1: Introduction To Residential Leasehold Management

**Trainer: Annie McGrandles (MRICS/FTPI) – PMR / Anna Mercer (MTPI/
AssocRICS) / Angela Wheeler – Ark Housing Consultancy**

Dates:

16th and 17th September – 9:30am to 12:30pm

Annie McGrandles: Online

8th and 9th October – 9:30am to 12:30pm

Anna Mercer: Online

11th November – 9:30am to 4:30pm

Angela Wheeler: In-Person TPI Wimbledon Office

A 6-hour interactive training course (3 hours a day over 2 days if online, a single 6-hour session if in-person), run by respected industry professionals, for those new to residential leasehold property management. It will provide an overview of the controls and processes required to effectively manage a leasehold block.

BOOK HERE 

TC59: Managing Your First Portfolio

Trainer: Cassandra Zanelli – PMLS

Dates: 18th, 19th and 20th September – 10am to 12pm – Online

A 6-hour course being run over 3 consecutive days (2 hours per day). Being a property manager is a demanding job; on any given day you can be required to demonstrate a variety of skills and knowledge. In this interactive legal workshop, we'll explore some of the common legal challenges that you might face and how to deal with them.

BOOK HERE 

PROPERTY MANAGEMENT

TC46: Basic Building Construction and Common Building Defects

Trainer: Neil Maloney (FIRPM/FRICS) – MyHomeSurveyor

Date: 19th September – 9:30am to 16:30pm

In-Person TPI Wimbledon Office

An introductory one-day course, held in-person, covering the basic elements of traditional and low-rise residential construction. It will help you understand the construction elements of a building and some more typical defects you can find in them.

BOOK HERE 

TC69: Pools and Gyms in Residential Blocks

Trainer: Rob Clarke – Motiv8

Date: 2nd October – 9:30am to 12:30pm

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

BOOK HERE 

TC81: Lift Maintenance

Trainers: David Smith and David Marks – Ilacs Lift Maintenance

Date: 27th November – 9:30am to 12:30pm

This 3-hour online webinar will introduce managing agents and property managers to lifts, lift maintenance and their responsibilities under legislation. Participants will gain an understanding of how a lift functions, lift maintenance management, applicable codes and standards and how to plan for when a lift reaches the end of its service life.

BOOK HERE 

PROPERTY MANAGEMENT

TC114: Introduction To Being An RMC/RTM Director

Trainers: Alan Walker – TPI Conference Co-Ordinator and Long Term RMC/RTM Director / Shabnam Ali-Khan – Russell Cooke

Date: 19th November – 9:30am to 12:30pm
In-Person TPI Wimbledon Office

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

This course will act as an introduction to all the key components of being an RMC/RTM Director and help you to understand the different elements involved in being a Director and develop how you carry out the role.

BOOK HERE 

W19: Planned Maintenance Procedures

Trainer: Michael Burkinshaw – Earl Kendrick

Date: 13th November – 1pm to 3pm

An extended webinar exploring what a Planned Maintenance Procedure actually is, the key benefits and how to create and sustain one effectively.

BOOK HERE 



HEALTH & SAFETY AND FIRE SAFETY

TC55: Introduction To General Health and Safety For Property Managers

Trainer: Shaun Lundy – Tetra

Dates: 25th and 26th September – 9:30am to 12:30pm

A 6-hour online course being run over 2 consecutive days (3 hours per day). This course is designed to introduce new entrants to the sector to the minimum Health & Safety knowledge essential to their career path. This course is intended to furnish Property Managers with the awareness to perform their day job safely and give comfort to their employers.

BOOK HERE 

TC90: Fire Safety Management For RMC/RTM Directors

Trainer: Shaun Lundy – Tetra

Dates: 22nd and 23rd October – 9:30am to 12:30pm

A 6-hour online course being run over 2 consecutive days (3 hours per day) for directors of Residents' Management Companies (RMC) and Right to Manage (RTM) Companies who have responsibility for fire safety management in residential blocks of flats.

BOOK HERE 

TC66: Introduction to Fire Safety For Property Managers

Trainer: Shaun Lundy – Tetra

Dates: 12th and 13th November – 9:30am to 12:30pm

This course is provided for block managers looking to learn the basics of fire safety for residential buildings. At the end of this course, you will understand who is responsible for what and why in terms of fire safety and will have a basic knowledge of the changes happening in this all-important area of block management.

BOOK HERE 

HEALTH & SAFETY AND FIRE SAFETY

TC62: Fire Safety Management (Senior Level) For Residential Managing Agents

Trainer: Mark Snelling – Safetymark and TPI H&S Advisor / Cassandra Zanelli – PMLS

Dates: 28th, 29th and 30th October – 9:30am to 12:00pm

A 7.5-hour course (2.5 hours over three days – online) for directors and senior managers responsible for fire safety management in residential blocks of flats.

BOOK HERE 

TC110: Leaseholder Protections and Landlord’s Certificates and Leaseholder Deeds of Certificate

Trainer: Cassandra Zanelli – PMLS

Date: 26th September – 9:30am to 12:30pm

A 3-hour online webinar exploring the leaseholder protections under the Building Safety Act.

BOOK HERE 

TC112: Building Safety Case Reports and Managing Agents

Trainer: David Hills – Ark Workplace Risk

Date: 6th November – 9:30am to 12:30pm

The aim of this 3-hour online training session is to help you, your team and your clients understand who has accountability for the development of a Building Safety Case Report, as well as to understand what is required, what support can be offered to AP/PAPs and how best to manage building safety in the long term.

BOOK HERE 

HEALTH & SAFETY AND FIRE SAFETY

TC116: Resident Engagement Strategies

Trainer: David Hills – Ark Workplace Risk

Date: 8th October – 9:30am to 12:30pm

The aim of this 3-hour online course is to help you, your team and your clients understand who has accountability for the development of a Resident Engagement Strategy but also understand the importance of capturing and understanding the demographics, needs and preferences of the residents, what a strategy must include and what support can be offered to AP/PAPs.

BOOK HERE 

W17: Preparing for Building Assessment Certificate Under The Building Safety Act

Trainer: Shaun Lundy – Tetra

Date: 3rd October – 2pm to 4pm

An important and timely 2-hour online webinar on Building Assessment Certificate (BAC) applications. Covering the core submission requirements e.g. safety case report, resident engagement strategy and mandatory occurrence reporting. This webinar will also outline the nature of the process of the applications, likely submission outcomes and costs.

BOOK HERE 

W18: An Introduction to the Building Safety Act – The ‘Need To Know’ in 2 hours

Trainer: Carly Melling – Savills

Date: 30th September – 1pm to 3pm

A webinar providing an introduction and overview of the impact of the Building Safety Act on the day to day operations of a property manager.

BOOK HERE 

TC100: Company Law Basics For Management Companies

Trainer: Cassandra Zanelli – PMLS

Date: 9th September – 9:30am to 12:30pm – Online

Residents' Management Companies and RTM companies are subject to the same rules and regulations as all other limited companies. With corporate-based challenges from members on the increase, it is important that managing agents are familiar with company law basics. This 3 hour online workshop will focus on the fundamentals of company law for management companies and troubleshoot some of the most common issues and challenges that managing agents face.

BOOK HERE 

TC82: Insurance In Residential Leasehold Property Management

Trainer: Rob Mayo – Insurety

Date: 13th September – 9:30am to 12:30pm – Online

This 3-hour Introduction to Insurance course (one 3 hour online session) is designed to provide property management staff with a sound knowledge of the insurance industry within the residential leasehold sector. The course will provide useful information to enable your staff to provide knowledge-based advice to clients in line with UK regulatory standards.

BOOK HERE 



TC103: Property Transfers – Implications For Property Managers

Trainer: Cassandra Zanelli – PMLS

Dates: 10th and 11th October – 9:30am to 12:30pm

This online training course (3 hours a day over 2 consecutive days), will explore the typical requirements found in leases relating to property transfers - equipping attendees with the confidence to read leases constructively and deal with the process to ensure a smooth transfer of the property to the purchaser. It will also consider the position on arrears.

BOOK HERE 

TC39: Reading Leases

Trainer: Annie McGrandles – PMR

Dates: 16th and 17th October – 9:30am to 12:30pm

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

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TC102: Company Directors And Secretarial Duties And Responsibilities

Trainer: Cassandra Zanelli – PMLS

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

This online training course (3 hours a day over 2 consecutive days) highlights the key responsibilities and duties of Company Secretaries and Directors in relation to RMCs and RTM companies.

BOOK HERE 

TC98: Granting Consent and Licenses To Alter

Trainer: Roger Hardwick and Mark North – Brethertons

Date: 10th December – 9:30am to 12:30pm

Property managers dealing with leasehold properties will often be faced with situations where a leaseholder has asked for permission to carry out work to their flat, or to sub-let the flat to another person, or even for permission to have an animal in the property. Knowing when permission is required and the basis for giving or refusing consent is an important part of residential leasehold management. This 3-hour online course will help you understand your role in the process.

BOOK HERE 

TC44: Introduction To Accounting For Service Charge

Trainer: Lisa Warren – RMG

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

A 6-hour online course being run over 2 consecutive days (3-hours per day) walking through the financial year of a property. This course is aimed at individuals with less than 18 months experience in the industry.

BOOK HERE 

TC11: Residential Service Charge Accounts Guidance

Trainer: Lisa Warren – RMG

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

A 6-hour online course (3 hours a day over 2 consecutive days) addressing best practice for service charge accounting.

[NOTE: This forum is not designed to teach book-keeping and is not suitable for relatively inexperienced accounts staff or property managers.]

BOOK HERE 

TC97: To Reserve Fund Or Not To Reserve Fund?

Trainers: Lisa Warren – RMG / Neil Maloney – MyHomeSurveyor

Date: 10th December – 9:30am to 1:30pm

This half-day practical workshop (one 4-hour session run online) is intended to explore the liability for providing a reserve fund in residential management and the rules governing its accumulation and use.

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HR AND WELLBEING

TC105: Effective Complaints Handling

Trainer: Lesley Horton – Deputy Ombudsman TPOS

Date for this course TBC – please email training@tpi.org.uk for further information

An effective complaints process aims to deal with complaints quickly and efficiently, identifying root causes and taking effective action to win back the confidence of the complainant. This online 3 hour webinar will help you build the toolkit personally, and within your organisation to create this.

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Why Study with The Property Institute?

There are three routes for a full qualification with TPI – Leasehold, Build to Rent and Factoring. What do these mean?

Leasehold Management – Leasehold is a type of home ownership in England and Wales where a person owns the right to occupy a property for a set period of time and this occupation is governed by a lease.

Leasehold properties are usually flats (although leasehold houses exist as well) and the communal areas including hallways, roofs, building structure, car parks, gardens etc. are owned by a freeholder.

A block property manager manages the communal areas and the building structure on behalf of the freeholder and leaseholders pay a service charge for the upkeep of those areas.

Build to Rent – Build to Rent is form of an ownership where one entity (individual or a company), owns the building/s, grounds and individual properties (e.g. flats) too.

Individual properties are then let out to tenants. A Build to Rent property manager manages the block and units, usually on behalf of the landlord, including rental and upkeep of the individual units too.

Factoring – Block management in Scotland is called factoring. Individual owners of flats are collectively responsible for the management and upkeep of their building too. They usually outsource this task to a professional called a factor.

All our qualifications have been developed around **TPI's '4 Elements' of residential property management**: Technical, Health and Safety, Customer and Consumer and Ethics and Behaviours. These 4 Elements are the foundations for any residential property management professional.

QUALIFICATIONS IN LEASEHOLD MANAGEMENT

Level 2 Foundation course and exam in Leasehold Management

Modules: 5

Course content access: 12 months

Study hours: 70 (guidance purposes only)

Start: anytime

Price: £249

This is an online, on demand course that starts the journey to full qualification. It consists of five modules, with a short knowledge quiz at the end of each module. The course is concluded with an online final exam.

Modules:

- Module 1 An Introduction to Leasehold Property Management
- Module 2 An Introduction to the Legal Framework in Leasehold Property Management
- Module 3 An Introduction to Health and Safety in Property Management
- Module 4 An Introduction to the Customer and Consumer in Property Management
- Module 5 An Introduction to Ethics and Behaviours in Property Management

Final Exam:

Multiple choice online exam that learners can access after completing all five modules of the course. It consists of 60 questions and has to be completed within an hour. Learners have three attempts to pass the exam. The attempts have to be at least 7 days apart. The pass mark is 70%.

Exam date:

- Any time

Course enrolment:

BOOK HERE 

QUALIFICATIONS IN LEASEHOLD MANAGEMENT

Level 3 Associate course and exam in Leasehold Management

Modules: 13

Course content access: 18 months

**Study hours: 162 hours
(guidance purposes only)**

Start: anytime

Price: £449

This is a nationally recognised qualification, accredited by the examination's regulator, Ofqual.

This is an online, on demand course learners can enrol onto after passing the Level 2 Foundation course and exam in Leasehold Management.

It consists of 13 modules with a short knowledge quiz at the end of each module. There is also a mock exam at the end of the course to assist in preparation for the real thing.

The course is concluded with a final written exam, delivered online.

Successful candidates can start using ATP1 post-nominal letters after their name.

Modules:

- Module 1 Introduction to the residential built environment
- Module 2 The Legal background to block management
- Module 3 Your role in property management
- Module 4 Introduction to Landlord and Tenant Law
- Module 5 Introduction to finance for property managers
- Module 6 Financial management
- Module 7 Introduction to Health & Safety
- Module 8 Managing the Building
- Module 9 Maintaining the Building

Module 10 Other legal topics review

Module 11 Affordable Housing and Mixed Tenure Management

Module 12 Customer & consumer

Module 13 Ethics & behaviours

Final Exam:

It is based on the qualification syllabus that can be found on our website. The exam takes place every three months. It is an online exam that can be taken from anywhere with stable and secure internet connection. The exam is invigilated via secure software with technical support available too. The exam takes 1 hour and 30 mins and the pass mark is 60%.

Exam date:

- Wed 2 October 2024 at 10am
- Wed 4 December 2024 at 10am

Course enrolment:

BOOK HERE 

QUALIFICATIONS IN LEASEHOLD MANAGEMENT

Level 4 Member course and exam in Leasehold Management

Modules: 6

Course content access: 24 months

Study hours: 205 (guidance purposes only)

Start: anytime

Price: £549

This is a nationally recognised qualification accredited by the examinations regulator, Ofqual.

This is an online, on demand course learners can enrol onto after passing the Level 3 Associate course and exam in Leasehold Management.

It builds on the L3 Associate course and consists of an additional six modules. There is a short knowledge quiz at the end of each module. There is also a mock exam at the end of the course to assist in preparation.

The course is concluded with a written final exam, delivered online.

Successful candidates can start using MTPI post-nominal letters after their name.

Modules:

- Module 1 Building Technology
- Module 2 Staff and team management and development
- Module 3 Property management topics
- Module 4 Project management
- Module 5 Customer and consumer
- Module 6 Ethics and behaviours

Final Exam:

It is based on the qualification syllabus that can be found on our website. The exam takes place every six months. It is an online exam that can be taken from anywhere with stable and secure internet connection. The exam is invigilated via secure software with technical support available too. The exam takes 2 hours and 30 mins and the pass mark is 60%.

Exam date:

- Wed 20 November 2024 at 10am

Course enrolment:

BOOK HERE



QUALIFICATIONS IN BUILD TO RENT

Level 2 Foundation course and exam in Build to Rent

Modules: 5

Course content access: 12 months

Study hours: 70 (guidance purposes only)

Start: anytime

Price: £249

This is an online, on demand course that opens the journey to the full qualification. It consists of five modules with a short knowledge quiz at the end of each module. The course is concluded with an online final exam.

Successful candidates are eligible to receive free membership to the UKAA.

Modules:

- Module 1 An Introduction to Build to Rent Property Management
- Module 2 An Introduction to the Legal Framework in Build to Rent Property Management
- Module 3 An Introduction to Health and Safety in Property Management
- Module 4 An Introduction to the Customer and Consumer in Property Management
- Module 5 An Introduction to Ethics and Behaviours in Property Management

Final Exam:

It is based on the qualification syllabus that can be found on our website. Multiple choice online exam that learners can access after completing all five modules of the course. It consists of 60 questions and has to be completed within an hour. Learners have three attempts to pass the exam. The attempts have to be at least 7 days apart.

The pass mark is 70%.

Exam date:

- Anytime

Course enrolment:

BOOK HERE



QUALIFICATIONS IN BUILD TO RENT

Level 4 Member course and exam in Build to Rent

Modules: 9

Course content access: 24 months

Study hours: 173 (guidance purposes only)

Start: anytime

Price: £1,198

This is a nationally recognised qualification accredited by Ofqual.

This is an online, on demand course learners can enrol onto after passing the Level 2 Foundation course and exam in Build to Rent management.

The course consists of nine modules with a short knowledge quiz at the end of each module. There is also a mock exam at the end of the course to assist in preparation.

The course is concluded with an online final exam.

Successful candidates can start using MTPI post-nominal letters after their name and will be eligible to receive free membership to the UKAA.

Modules:

- Module 1 Key principles
- Module 2 Customer care
- Module 3 Portfolio management
- Module 4 The PRS, BTR, design, planning and sustainability
- Module 5 An Introduction to traditional residential management
- Module 6 Building management
- Module 7 Residential letting and management 1
- Module 8 Residential letting and management 2
- Module 9 Health & safety

Final Exam:

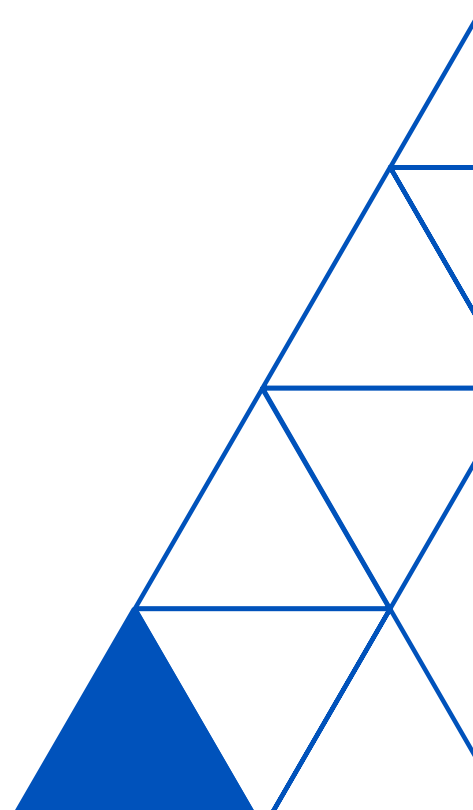
It is based on the qualification syllabus that can be found on our website. The exam takes place every six months. It is an online exam that can be taken from anywhere with stable and secure internet connection. The exam is invigilated via secure software with technical support available too. The exam takes 2 hours and 30 mins and the pass mark is 60%.

Exam date:

- Wed 18 September 2024 at 10am

Course enrolment:

BOOK HERE



FACTORING QUALIFICATION

Professional Diploma in Property Factoring

Modules: 7

Course content access: 24 months

Study hours: 280 (guidance purposes only)

Start: anytime

Price: £595

The qualification is on the Scottish Credit and Qualification Framework (SCQF).

This is an online, on demand course learners can enrol onto without prior qualification in Factoring.

The course consists of seven modules with a short knowledge quiz at the end of each module. There is also a sample exam to assist in preparation.

The course is concluded with a written final exam, delivered online.

Successful candidates can start using MTPI post-nominal letters after their name.

Modules:

- Module 1 Introduction to Property Factoring
- Module 2 Property Factoring – Historical, Legislative and Cultural Context
- Module 3 Legal Matters in Factoring Practice
- Module 4 Managing Factored Property
- Module 5 Building Technology
- Module 6 Health and Safety
- Module 7 Finance and its Management

Final Exam:

It is based on the qualification syllabus that can be found on our website. The exam takes place every six months. It is an online exam that can be taken from anywhere with stable and secure internet connection. The exam is invigilated via secure software with technical support available too. The exam takes 2 hours and 30 mins and the pass mark is 60%.

Exam date:

- Wed 11 September 2024 at 10am

Course enrolment:

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EXAM WORKSHOPS

Exam Preparatory Workshops for Level 3 Associate Exam in Leasehold Management and Level 4 Member Exam in Leasehold Management

Workshops are half-day online sessions run as webinars and they look at the detailed requirements of the syllabus and structure of the exams. Attendees are given 'tips' on how to prepare and how to manage their time on the day.

Exam questions are often based on practical property management scenarios and the workshop includes interactive discussions to share experiences of good practice.

The next workshops are:

Level 3 Associate exam in Leasehold Management

Thu 5 September 2024 – 9:00am or 1:30pm
Thu 19 September 2024 – 9:00am or 1:30pm
Wed 6 November 2024 – 9:00am or 1:30pm
Thu 21 November 2024 – 9:00am or 1:30pm

**WORKSHOP
BOOKING** 

Level 4 Member exam in Leasehold Management

Thu 17 October 2024 – 9:00am or 1:30pm
Thu 7 November 2024 – 9:00am or 1:30pm

**WORKSHOP
BOOKING** 

HOW DO I START?

Becoming a member is simple – visit our website and complete the process

All new members join at the Affiliate level. Associate (ATPI) or Member (MTPI) status may be offered to existing Affiliates or new applicants. If successful, in most cases you will still be required to sit and pass either our Level 3 or Level 4 exam in order to be upgraded to Associate (ATPI) or Member (MTPI).

All TPI qualifications and the use of post-nominal letters are exclusively available to TPI members.

There are many benefits to becoming a member:

Please contact the Membership team on info@TPI.org.uk who will require copies of relevant documents such as certificates, CV and completed application form.

There are four levels of membership:

Affiliate

ATPI  Associate

MTPI  Member

FTPI  Fellow



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CONTACT US

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W: www.tpi.org.uk

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