

Recommendations and Actions Service Charge

Areas for consideration	Service Improvement Panel recommendations	Executive Director comments	Recommendation agreed (Y/N)	Implementation date By whom	Review Date
1) Website and My PA App enhancements	Add a dedicated section to the website and My PA app that clearly explains the role of each team (e.g., Service Charges, Estates, etc.) and their responsibilities. This will help set clear expectations from the outset.	This should be a 'quick win' action to improve access to information for residents	YES	31/12/24 Head of Communications / Digital Systems Analyst	
2) Proactive Communication Actuals / Budget	<p>Introduce proactive communication about changes to service charges via email or letter to explain significant changes to charges, along with comparisons to previous years' service charges. This step aims to reduce resident enquiries. by providing timely, transparent updates alongside statements.</p> <ul style="list-style-type: none"> • Include: an itemised service charge schedule (e.g., for 	This is part of the team's ambition but has significant workload implications across all estates. We will focus on high profile / risk estates first and gradually roll out from there.	YES in principle	Start from 24/25 year end statements Head of Finance Shared Services	

	<p>gardening, window cleaning, electricity, bulk rubbish collection, etc.).</p> <ul style="list-style-type: none"> • Explain: how charges are calculated in a straightforward way (e.g., from Estate to Block to Property levels). • Clarify: the different tenure types at the development, noting if any have varying charges and why (e.g., management fees). • Provide: the total service charges for the entire development to help residents verify the apportionment accuracy. <p>Establish the criteria for what is considered to be a significant change.</p> <p>Provide a single point of contact to take ownership of a resident service charge enquiry/complaint from start to finish.</p> <p>The case handler should provide regular feedback.</p>	<p>These points will be factored into our planning</p>	<p>Yes</p>		
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	<p>Implement a new policy on appropriate financial compensation to residents when deadlines have not been met.</p> <p>payments to residents for incorrect service charges should be fully backdated to when the problem first occurred,</p>	<p>The service charges team operates on a patch basis and we have started to name lead contacts on communications out to residents.</p> <p>This reads across to our existing complaints and compensation policies</p>	<p>YES</p>	<p>Already happening</p> <p>Head of Finance Shared Services</p>	
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		<p>This is already our policy, residents should not be worse off as a result of service charge errors and where we discover such errors, refunds will be made.</p>	<p>YES</p> <p>N/A</p>	<p>31/12/24</p> <p>Director of Business Improvement</p>	
3) Response times	<p>Provide and adhere to reasonable time frames when handling resident enquiries.</p>	<p>This is accepted although there are certain times in the year when we receive a significant spike in incoming queries, this can impact our ability to respond to all enquiries as quickly as we would like. However, we will</p>	<p>YES subject to team capacity at times of high query volumes</p>	<p>31/12/24</p> <p>Head of Finance Shared Services</p>	

		work to improve our communication with residents so that they are updated if things may take a little longer.			
4) Visual communication tools	<p>Consider using infographics or flowcharts that visually explain the process. This could be easier for residents to understand than text descriptions alone.</p> <p>Offer online video tutorials or webinars where the Service Charges (SC) team explains how to read the budget statements. This could be particularly helpful for residents who prefer interactive learning.</p>	<p>Agree that this would be a helpful additional source of info.</p> <p>Happy to look at this, suspect relatively few residents will want to attend webinars but we could make short video tutorials available.</p>	<p>YES</p> <p>YES</p>	<p>31/3/25</p> <p>Head of Finance Shared Services</p> <p>31/3/25</p> <p>Head of Finance Shared Services</p>	
5) Ensure information is	Consider creating a dedicated page on	Would be part of our	YES in	28/2/25	

<p>accessible in line with the Equalities Act 2010 providing support and reasonable adjustments where required</p>	<p>the website with translations of key documents in the most spoken languages amongst PA residents. This can reduce the reliance on phone calls and improve accessibility.</p> <p>Provide support via online platforms and face to face residents who are protected under the protected characteristics of the Disability Act 2010.</p>	<p>wider work around ensuring documents / information are as accessible as possible. Note here that translation services are expensive and the costs escalate if documents are regularly updated.</p> <p>We will be guided on this by our data and reach out to residents who may need support via different media / platforms.</p>	<p>principle</p> <p>YES subject to resource availability</p>	<p>Head of Communicati ons</p> <p>28/2/25</p> <p>Head of Finance Shared Services</p>	
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6) Feedback loop	<p>Establish a two-way communication process between staff members and residents.</p> <p>This could help the organisation continuously improve its materials and processes based on actual user experience.</p>	<p>Initial contact between residents and Neighbourhood Coordinators, who in turn can liaise with the central Service Charges team</p>	YES	Structure is already in place, we will reinforce expectations	
7) Resident education	<p>Host regular workshops or webinars for residents explaining the service charge process, common issues, and how to raise queries effectively. This could reduce the number of repetitive or misdirected inquiries.</p>	<p>Happy to try this although resident appetite may be limited. We are currently running a series of workshops to gather feedback on our SC communication approach, attendance at these may guide future work.</p>	YES, links to recommendation 4	<p>31/3/25</p> <p>Head of Finance Shared Services</p>	

	<ul style="list-style-type: none"> • Offer clear guidance on the complaints and enquiries process to ensure residents can easily contact PA Housing and navigate their issues confidently.by breaking down jargon and explaining relevant legislation. Provide accessible explanations, especially when residents request copies of invoices or other financial documents. 	<p>This is in line with our overall ambition</p> <p>As above</p>	<p>YES</p> <p>YES</p>	<p>28/2/25 Head of Finance Shared Services</p> <p>28/2/25 Head of Finance Shared Services</p>	
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8) Centralised query tracking	Provide clearer guidance on the complaints and enquiries process to ensure residents can easily contact PA Housing. Implement a centralised query-tracking system for residents to view the status of their enquiries, ensuring transparency and reducing the need for follow-up calls or emails.	Definitely see the need to improve the experience for residents. Long-term solution is technology led but in the meantime we will look at how we can better support query tracking.	YES	Head of Finance Shared Services	
9) Neighbourhood Coordinators (NCs)	<p>Include a description of NC responsibilities in welcome packs, on the website, and in communications about service charges or neighbourhood issues.</p> <p>Add a QR code to all non-electronic literature linking to the website for ease of access.</p>	<p>I will liaise with our Director of Neighbourhoods on this.</p> <p>Think we have already been using this technology but will look at potential areas of expansion.</p> <p>Response SAU website - agree the</p>	<p>YES</p> <p>YES</p>	<p>31/12/24</p> <p>Director of Neighbourhoods</p> <p>28/2/25</p> <p>Head of Finance Shared Services</p>	

		information is due on our websites in Dec 2024 we will work with the SC team to ensure that the description of the role is available to them to use for their publicity material			
10) Contact details for Neighbourhood Coordinators (NCs)	<p>Provide residents with telephone contact details for their NC. Establish clear response time guidelines and designated hours for contact.</p> <p>Provide an alternative contact method, e.g. a dedicated email address, for non-urgent queries.</p> <p>Use sign-in sheets for NCs in communal areas during onsite visits and inform residents of any findings or updates from the visit.</p>	<p>We discussed potential issues and risks here, and agreed that the ask should be limited to Neighbourhood Champions. I will raise with the Director of Neighbourhoods for consideration.</p> <p>Believe this is already being looked at.</p>	Not achievable	31/12/24	Director of Neighbourhoods

	<p>Share the schedule for NC onsite visits, including the day, time, and frequency, and give residents sufficient notice ahead of each visit.</p>	<p>SAU response</p> <p>Due to the monitoring of contact between residents and colleagues through our CRM and telephony platforms, we regret that we are unable to accommodate this request, it's important that we ensure that all contact is recorded particularly for complaints, HOS, or general day-to-day business requirements. We also monitor our NC's attitudes and behaviours via our QA team and we would not be able to achieve that if calls were direct. We also</p>		<p>31/12/24</p> <p>Director of Neighbourhoods</p>	
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		<p>cannot consider direct for our Resident Representatives; we do encourage contact via email and the NC should be regular monthly contact with the Resident Representative. We appreciate that the role of the Resident Representatives hasn't quite gone smoothly recently but we are working with our colleagues in eh RI&E team to relaunch this.</p> <p>we also need to consider that the role of the NC has high turnover due to the nature of the role and the opportunities it generates once in</p>			
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		<p>post. with our new inspection regime now in place the date and time of the NC visits and completions will be able to be directly uploaded onto the new website pages when launched.</p>			
<p>11) Performance metrics for case handlers</p>	<p>Introduce performance metrics for case handlers such as response time, resolution time, and resident satisfaction scores. Tie these metrics to staff evaluations and incentives.</p>	<p>This is already in place internally; we agreed that it wouldn't be appropriate for residents to have access to these details. I explained that often, case handlers are not in direct control of response timelines because they are reliant on</p>	<p>N/A – already embedded within our performance management framework.</p>		

		information from other areas of the business.			
12) Regularly monitoring of service charge throughout the year	Set up quarterly catch ups between the Service Charge team and all other departments who provide information relating to service charges as well as teams handling service charge enquires.	We have started work on this although there is more to do. Regular review of the more complex estates and sharing updates with residents is a key ambition.	YES	Ongoing – review through 2025/26 financial year Head of Finance Shared Services	
13) Proactive maintenance plan	Develop a proactive maintenance plan that is shared with residents. This plan should include regular inspections, planned repairs, and scheduled service reviews to minimise reactive maintenance.	Elements of this are already in progress. It's not directly a service charges matter and would be led by other areas of the business. Sau Response The new	YES subject to the views of relevant service leads	TBC Director of Neighbourhoods (estate inspections) Director of Asset Management (Planned Maintenance)	

		neighbourhood website will also have a platform for neighbourhood action plans which we will actively update based on the information provided from around the business) Senior Building Services Manager (plant inspections)	
14) Contract management	<p>Be more proactive in monitoring contract performance addressing poor performance when required. Monitor services and repairs that are requested to ensure work has been completed and within reasonable time frames.</p> <p>Ensure procurement processes are followed when appointing new contractors.</p>	<p>We have established a new Contracts and Partnerships team to take on this work and escalate contractor issues more assertively.</p> <p>Key aspect here is following the rules on consultation with residents about costs which will be recharged, and</p>	<p>N/A – new arrangements recently put in place.</p> <p>YES</p>	<p>31/3/25</p> <p>Procurement</p>	

		seeking their input on services which are important to them. We will review our procurement guidelines to ensure this is fully incorporated		Manager	
15) Independent resident-led Audit	Engage an independent auditor to periodically review service charge calculations, contractor performance, and the transparency of the financial process. Share the audit results with residents.	We discussed the cost-benefit relationship of audit work and agreed that this was not the way to go. Instead, the new Neighbourhoods model needs to continue evolving with our Neighbourhood Coordinators being the residents' 'auditors' on their patch in terms of reviewing and validating costs and charges.	NO although aspects of this will feed into our ongoing internal audit programme.		

<p>16) Residents Group</p>	<p>Establish a resident's group at each development to review invoice charges, auditing, management fees, and supporting information before issuing to residents.</p> <p>Provide clear guidelines on their roles and responsibilities, hold structured meetings, and communicate decisions or recommendations to all residents.</p>	<p>We are working to strengthen communication and consultation with residents as part of the annual service charge setting process. Residents who are particularly interested may also be able to support us with more detailed review of the numbers.</p> <p>We will establish mechanisms for interested residents at specific estates to become involved in the review of charges</p>	<p>YES subject to demand – focus on known high profile estates first</p> <p>This will entail joint working between the Service Charges and NC teams</p>	<p>31/3/25</p> <p>Director of Finance & Director of Neighbourhoods</p>	
<p>17) Develop pathways to allow residents to be able to get involved with things that matter</p>	<p>Group items under services (such as fire safety) to provide clarity to residents and assurance they are not being charged twice for the same items (such</p>	<p>There is always scope to improve explanations and we will continue to look</p>	<p>YES</p>	<p>28/2/25</p> <p>Head of Finance</p>	

<p>to them.</p>	<p>as fire equipment, fire other, fire repairs).</p> <p>Provide definitions of Estates, Blocks and Property as well as details of the number of properties within each estate.</p> <p>Provide explanations on the apportionment as well as an itemised breakdown of the “Provision of Use” category.</p>	<p>at this.</p> <p>We will work to develop this detail.</p>	<p>YES</p>	<p>Shared Services</p> <p>28/2/25</p> <p>Head of Finance Shared Services</p>	
<p>18) Cover for NCs when unavailable</p>	<p>Ensure cover for all patches if NCs are unavailable due to sickness absence, annual leave.</p>	<p>This is a housing services issues, as a matter of course we should be ensuring adequate cover, and the team expects to do this when fully staffed. I will raise with the relevant Director .</p> <p>SAU response we endeavour to cover all patches where we can however, we have 65 patches and 65 NC's so this can</p>	<p>yes</p>		

		often be a concern if we have an increase in absences.			
19) Shared Ownership homes managed by third-party management companies	<p>Ensure PA staff or residents are present at the AGMs of third-party management companies to represent the views of all residents and clarify their role at the meeting.</p> <p>Consider negotiating with third party partners to agree that one post on their Board be allocated to a PA staff member with the relevant skills and experience to undertake the role.</p>	The new Contracts and Partnerships team will be looking at this. In principle we have already agreed internally that stronger representation for our residents on mixed tenure estates would be advantageous.	YES	TBC Head of Contracts and Partnerships	
20) Shared Owners with management agreement	<p>Provide residents with timely online access to invoices and contracts (such as for gardening, window cleaning, communal cleaning, and general maintenance) for their estate. Or available on request printable version</p> <p>Ensure all signed off accounts are</p>	We have identified this as a key action and are starting to look at the technology we need to make it happen.	YES	Timescale TBC Executive Director of Resources	

	available for residents to review.				
21) Service charge statements (Budgets and Actuals)	<p>Work much more closely and transparently with residents on statements to provide the financial information, explanations and clarity that residents want to see.</p> <p>Involve residents in the end-to-end service charges process to review invoices and other charges (such as management/admin fees) before issuing them to residents. This should significantly reduce enquiries and complaints and should reduce PA's response time frames.</p>	Links to previous recommendations and is something we will continue to work on.	N/A		
22) Provide support and guidance for Shared Owners around auditing information.	<p>Provide information in a clear and concise format, allowing shared owners to easily review and understand where their money is being spent.</p> <p>Include tips and how to guides to support residents to understand the invoices provided (if invoices have been</p>	Links to previous recommendations and is something we will continue to work on.	N/A		

	<p>requested by a resident).</p> <p>Provide Shared Owners with information about the auditing process in an accessible format.</p> <p>This information should be available (via the website for example) without residents having to request it.</p>	<p>Here we would need to know what kind of information residents are looking for.</p>	<p>TBC</p>		
<p>23) Accuracy of data</p>	<p>Each year, review and compare the current budget and actual statements with those from the previous year, and share these comparisons with the resident group</p>	<p>We have already implemented this within the team. For higher profile / risk estates this will be augmented with a senior manager review of the draft accounts before they are issued.</p> <p>Findings and any issues can be fed into resident group</p>	<p>YES</p>	<p>N/A – already in place</p>	

		liaison where these are established.			
24) Accuracy of data	Ensure source data is accurate and Reliable historical data is retained for future reference.	Linked to the above recommendation	N/A		
25) Lessons learnt	<p>Establish a lesson learnt log that should incorporate improvements we have made to the service as a result of resident feedback.</p> <p>Where an error has been identified effecting one specific property, review other properties within that scheme and correct similar issues if identified.</p>	<p>Similar to the above – we have already reflected on the need to improve the learning culture so that mistakes aren't repeated. For each estate we are developing a key facts and information log which sets out the main aspects / issues and how they feed into the service charge. This will include images to help the team visualise how the numbers link to reality on the</p>	N/A		

		ground.			
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