

## Appendix 1 – Service Charge Customer Scrutiny Panel Exercise Action Plan

Report Recommendation	Action	By who	Progress
<p>Provide a clear and simple breakdown, which is specific to the property or scheme and explains what the service charge pays for.</p>	<p>There is a legal requirement for us to provide this around variable service charges. (Please see examples)</p> <p>We are creating a similar breakdown for all schemes where a fixed service charge is in operation. This will be ready for the 2024-25 round of service charge notifications</p>	<p>Alison Ducker</p>	<p>January 2024 – this was completed in March 24 when all general needs residents who pay a service charge were sent a breakdown of their budget for the 24-25 period. This will be sent out each year going forward</p>
<p>Ensure customers know when services are completed and the frequency e.g., how often is the grass cut?</p>	<p>We recognise that our website is light on information about service charges and so a first step we will work with the marketing team on improving that so that customers can use the website to see what services are provided and the frequency at which they take place. We will publicise this in our service charge communications and at the start of a tenancy. We aim to complete the enhancement of our website by March 2024.</p> <p>Our back-office IT systems do not currently allow us to contact customers to let them know in real time when work is completed. At the point this is technically possible we will work with customers</p>	<p>Alison Ducker</p>	<p>March 2024 – there is now a section of the external website that gives more info on service charges in general. This will be expanded in the future</p>

	to see how they would like us to communicate this and how frequently they would like to see these communications happen.		
Use the “Joseph Road service charge letter” as a basis for all service charge letters, with a table detailing the breakdown.	Our intention during this financial year is to create a letter in the same format as the Joseph Road example which details the weekly cost of each element of the service charge in the same way as the weekly rent is quoted.	Alison Ducker	January 2024 – this was sent to all with the service charge budget in March 24 and this will be enhanced in the future
Use the “Cleaning Service Specifications Ridgeway”, as a template, include this in the “starter” pack, and have it available for tenants that are unable to access it online	We are pulling together a schedule to create a scheme-specific pictorial specification for all schemes where we are charging a service charge. The schedule will start with our larger schemes and will also priority schemes where we know based on feedback that customers are unclear about what work is completed at each visit. An electronic and hard copy version will be made available to suit customers' preferences.	Rob Chapman	Rolling programme starting in August 2023
Ensure people are told when their service charges change, why this has happened, and what the additional money pays for.	The new notifications on service charges starting 2024-25 will highlight where there have been above-inflation increases in service charges and the reason for these.	Alison Ducker	January 2024 – where this was the case this was explained in the letters that went out in February and March 2024
Understand people’s preferences for how service charge information is communicated and consider	There is a wider piece of work looking at how we issue communication based on customer preferences. We agree it would be beneficial to issue information electronically to those whose	N/A	N/A

using this to reduce costs and the impact on the environment.	preference is to receive it in this way, and we will do this as soon as the work on the customer's preferred methods is completed and recorded on our systems.		
Consider using email and promoting the use of “My Account” on the SYHA website to share information about service charges, but not as the only approach as this will exclude people	Our intention is to make much wider use of email notifications where customers have given this as their preference, and this would fulfil any legal requirements we are required to adhere to. We will look at how we can use the reporting element in My Account to better allow customers to raise any questions or concerns around service charges.	Simon Young	April 2024 onwards – This work is ongoing and is linked to wider corporate projects in both these areas
Be mindful of people’s communication and learning needs, and how they may benefit from different support to understand service charge information.	We already offer and provide drop-in sessions as some of our larger schemes to run through the service charge accounts and breakdowns. We will look at how we might use information about our customer's communication needs to better target support aimed at ensuring they understand the service charge and the services they should receive for this. We will provide the scrutiny group with examples of how we have done this.	Alison Ducker	January 2024
If service charge information is posted to tenants ensure other documents don’t overshadow it, it needs to stand out visually and grab people’s attention.	We are looking at both in-house and external options to improve the design of our service charge information so that it's easier for customers to understand and also pick out the most important elements within it. This work will be completed by the time the next annual round of service charge information is issued.	Simon Young	January 2024 – the first version of improved service charge information was developed in-house and issued with this year's service charge letters

<p>Ensure people know who to contact, and how to contact them, if they have any questions about service charges, any feedback and know how to complain.</p>	<p>We already include this in all the hard copy notification we send out but will ensure this is replicated for all other methods. It will form a key component to improvements to our website and any changes to the My SYHA application.</p>	<p>Alison Ducker</p>	<p>March 2024 – details provided in letters from February and March 24 and given on the external website</p>
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