



18 August 2025

Leaseholder Meeting



Agenda

- **5.30pm:** Welcome with introductions & housekeeping- Jessica McGuinness, Customer Voice & Communications Officer
- **5.35pm:** Management fees & seeking financial support – Zakiyya Richardson, Financial Reporting Manager
- **6pm:** Our website – Fran Worthington, Home Ownership Team Leader
- **6.15pm:** Updates from the Trust – Zakiyya Richardson, Financial Reporting Manager, Caren Breddy, Estates Manager
- **6.35pm:** Have your say & ask us questions – over to you
- **6.55pm:** What's next & get involved – Jessica McGuinness, Customer Voice & Communications Officer



Welcome & Housekeeping

- Welcome!
- No fire alarms planned / toilets
- Any specific issues relating to your property will be dealt with outside of the meeting, we will raise a call back with the right team.
- Hands up
- Keep an eye out for a survey following the session.
- Summary of the meeting will be shared with all leaseholders by 02 September 2025
- Now, introductions from Peaks & Plains.

Peaks & Plains staff

- Fran Worthington (Home Ownership Team Leader)
- Clare Davies (Service Charge Accountant)
- Jacqui Kidd (Finance Assistant)
- Zakiyya Richardson (Financial Reporting Manager)
- Jessica McGuinness (Customer Voice & Communications Officer)
- Caren Breddy (Estates Manger)
- Jules Booker (Director of Resources)

Management Fees

Leasehold management fees are a part of service charges that leaseholders pay to their landlord / management agent for the management of the building and communal areas.

This includes the following as an example:

- Processing service charges, sending invoices, sending reminders, managing payments, and maintaining records
- Overseeing contractors on cleaning, communal repairs, ground maintenance etc
- Responding to leaseholder queries, providing information and organising meetings

Current charges and proposed charges

- We currently charge 15% for a management fee but are looking a move to a fixed fee structure.
- The RICS (Royal Institute of Chartered Surveyors) Code of practice for Service charges for residential management prefers a fixed fee rather than a percentage to be used.
- This method is preferred so that leaseholders can budget annual expenditure.
- Where the lease specifies a different form of charging, the method in the lease must be used.

How will a fixed fee be calculated?

- A fixed fee will be calculated on a sliding scale based on the time spent managing the particular block / estate.

Leasehold flats requiring low level management:

- Communal repairs
- Buildings Insurance
- Examination Fee
- Sinking Fund
- Management Fee

Leasehold flats requiring high level management:

- Bin chute servicing
- Lightning conductor servicing
- CCTV servicing
- Communal caretaking
- Communal electric
- Water monitoring
- Communal window cleaning
- Door entry servicing
- Emergency light testing
- Fire monitoring



How will we calculate the fixed management fees and how will we ensure they are reasonable?

- We will estimate the staff time spent on managing leasehold properties and the relevant overheads (such as printing and postage).
- The Trust will benchmark the management fees.

Leaseholder Advice and Financial Support

- ⑩ We understand that owning a leasehold property can sometimes cause frustrations and / or financial pressures.
- ⑩ We want to help our customers and will try and answer any questions you may have. We will also discuss payment plans with those who experience financial difficulties.
- ⑩ Should you need further lease advice or financial support we would recommend getting in touch with organisations such as Citizens Advice and The Leasehold Advisory service.



Our website & information

- Did you know we have section on the website dedicated to Leaseholders?
- Do you use the website?
- What would you like to see on our website?



Home Ownership/Finance - update

Update for Leaseholder Forum August 2025



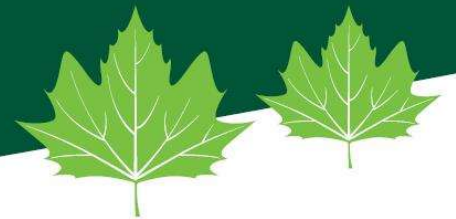
What have we been up to in 2025?

- Service charge internal audit
- Completed service charge audit tender
- Completed buildings insurance tender
- Completed sinking fund rollout
- Sent leaseholder budgets for year 2025/26
- Prepared the service charge actuals for year 2024/25
- Sent building insurance policies
- Updated the Leaseholder Charger Recovery Policy
- Leaseholder service charge audit for 2024/25 actuals (on-going)



Estate Services - update

Update for Leaseholder Forum August 2025



Communal spaces update - Scrutiny

- Our Spring 2025 Scrutiny saw our panel taking a deep dive into our Communal Cleaning service and making recommendations on how we can improve.
- Seven tenants and one shared owner reviewed our Communal Cleaning service
- The Scrutiny Panel made a number of recommendations which we will be working on over the coming months.

Communal spaces update - Scrutiny

- The Panel suggested that a move to in-house cleaning could be the best approach to improving cleaning standards and accountability.
- The Panel agreed that an infographic should be created about the responsibilities of the Trust and the responsibilities of tenants regarding communal cleaning;
 - To be reviewed on an annual basis but updated on an ad-hoc basis as and when necessary.
 - To be sent to all residents with a communal area in line with their preferences.
 - To be shown on communal noticeboards.
 - To be included during sign-up where relevant.



Communal spaces update - Scrutiny

- The Panel suggested that a webpage should be created for more information about Communal Cleaning.

We will work closely with our Customer Voice & Communications Team to create this page under our Trust Tenant Charter.

- Members suggested that fixed geographical locations/patches could be established for in-house cleaners.

We will implement this once the move to an inhouse service has been completed.

Communal spaces update - Scrutiny

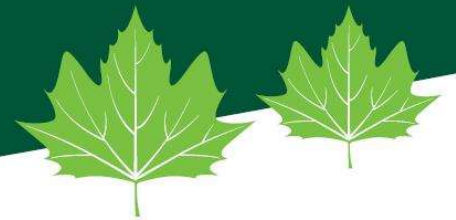
- More communications around belongings being stored in communal areas, including the health & safety risks of this.
- Introducing random spot checks at sites with communal cleaning services.
- The Neighbourhoods Team to complete quarterly checks on communal cleaning standards on their relevant patches and during attendance at coffee mornings in over 55s accommodation.
- Surveying customers who've responded previously to our communal cleaning surveys – using responses to measure changes in satisfaction and feedback. The Panel said that this should be done 6 months after the in-house service is introduced.

Reviewing feedback

- As a result of historic complaints and TSM data and a recent Scrutiny review, the in-house Estates Operatives will be moving to a patch based allocation of jobs.
- The intention is to identify and resolve issues and not 'assume' someone else has reported it.
- Creating an ethos of:
'The standard you walk past is the standard you accept'.
- The new way of working will start to be introduced from September 2025, but will take a few months to fully roll out and implement.



Over to you – Q&A



What's next?

- **Leaseholder General meeting** – Annually (for all Leaseholders, whether they have told us they'd like to get involved or not).
- **Leaseholder Forum** - those who have expressed an interest in being involved (ad-hoc).

Get involved

- Other customer panels e.g. Grounds Maintenance Resident Group (GMRG), Damp & Mould Panel, Asset Management Monitoring Group
- Commentator Panel

Email getinvolved@peaksplains.org to sign up to our mailing list