

Strategic Leasehold Review – Improvement Plan			
Project:	Strategic Leasehold Review		
Lead:	Paul Weston	Date Complete:	September 2024
Workstream	Progress	Complete	Actions
Revise Section 20 notices so they are more customer friendly, and the explanation of works goes beyond statutory requirements.		COMPLETE	<ul style="list-style-type: none"> S.20 Notices drafted by Cambell Tickell and included at Appendix 3
Ensure Section 20 notices are supported by additional information that explains the Section 20 process and answers questions commonly asked by leaseholders		COMPLETE	<ul style="list-style-type: none"> S.20 Notices drafted by Cambell Tickell and included at Appendix 3
Update website to provide leaseholders with more detail on the Section 20 procedure.		DEC 2024	<ul style="list-style-type: none"> Develop Leaseholder policy and share via website.
Draft Section 20 policy and procedures to ensure Section 20 notices are completed and administered correctly and that officer responsibilities are defined for each stage of the process. Procedures should include some informal consultation with leaseholders before entering the formal Section 20 process.		DEC 2024	<ul style="list-style-type: none"> Appoint Campbell Tickell to work with the Council to develop policy.
The Council should clearly save the original, dated Section 20 consultation		COMPLETE	<ul style="list-style-type: none"> New notices will be properly recorded upon issue. This will be applied to all new notices issued.

notices to ensure no ambiguity when subsequent queries are raised.			
Notices should be addressed to the leaseholder at the correspondence address.		COMPLETE	<ul style="list-style-type: none"> Where Leaseholders have given an alternative address for correspondence this is already being used.
Develop a Repayment Options policy that gives leaseholders repayment options for the cost of major works		DEC 2024	<ul style="list-style-type: none"> AD Finance, s151 Officer, ED Communities and Portfolio Holder to consider options. Initial view that current Corporate Credit Policy applies to Leasehold Service Charges.
Review all lease agreements to ensure officers understand the terms of each, in particular the extent of the demise of the property.		APR 2025	<ul style="list-style-type: none"> In-house team to be developed, training and support to be provided. As and when needed external support to be engaged to provide updates and training. Annual review of processes to capture changing legislation.
Improve knowledge of leasehold legislation and practice across TBC by engaging a retained leasehold consultant to advise on leasehold matters.		APR 2025	<ul style="list-style-type: none"> In-house team to be developed, training and support to be provided. As and when needed external support to be engaged to provide updates and training. Annual review of processes to capture changing legislation.
<p>Modernise lease agreements terms in order that leases issued moving forwards:</p> <ul style="list-style-type: none"> Review RTB lease for new RTB sales to include renewal and improvement clauses and the ability to collect a management fee to deliver the leasehold service. 		APR 2025	<ul style="list-style-type: none"> Right to buy team to work with external legal support to review lease documents. Leasehold Policy to include provisions for lease extensions and lease amendments. External legal support to be commissioned to advise on the inclusion of management charges and the possible routes to achieving this. Further approvals for this to be sought from Cabinet once legal advice is available.

<ul style="list-style-type: none"> Review approach to lease extensions for existing leaseholders. Consider offering leaseholders a non-statutory route to lease extensions with incentives such as reduced premium costs, legal costs etc. if renewal, improvement and management fee clauses are included in the new lease. 			
<p>Explore whether legally it would be possible to introduce a management fee to existing leaseholders to pay for the delivery of the leasehold service. There is case law (Brent v Hamilton 2006) that suggests that this may be possible.</p>		<p>APR 2025</p>	<ul style="list-style-type: none"> External legal support to be commissioned to advise on the inclusion of management charges and the possible routes to achieving this. Further approvals for this to be sought from Cabinet once legal advice is available
<p>Update the stock condition survey information with the outcomes of the roof inspections to provide a current data base to inform investment.</p>		<p>JAN 2025</p>	<ul style="list-style-type: none"> Complete Stock Condition Survey and update all records within housing management system. Update condition data on a regular basis
<p>Use repairs, void and other recent feedback information to update the stock condition data base with regular operational information.</p>		<p>JAN 2025</p>	<ul style="list-style-type: none"> Complete Stock Condition Survey and update all records within housing management system. Update condition data on a regular basis

Undertake on site sample inspections to validate the life cycle projections to inform the investment programme for imminent planned or major works		APR 2025	<ul style="list-style-type: none"> Update condition data on a regular basis
Identify the specific blocks that are likely to be in the following year's programme and identify the number of leaseholders likely to be affected to assist with both consultation and cost and income analysis		JAN 2025	<ul style="list-style-type: none"> Carry out stock condition survey and update records. Condition survey will identify future programmes. Condition survey will drive MTFS and HRA business plan
Prepare 5 year and 30 year investment plans to clarify potential investment decisions and financial impact.		JAN 2025	<ul style="list-style-type: none"> Carry out stock condition survey and update records. Condition survey will identify future programmes. Condition survey will drive MTFS and HRA business plan
Publish indicative 5 year investment plans annually and ensure leaseholders are aware when works are planned for their building.		MAR 2025	<ul style="list-style-type: none"> Indicative programmes to be published based on condition survey data, HRA Business plan and MTFS budget setting.
Following the recommendations in the roof report, assess the costs for each block for the remedial works to prolong the life of the roof for approximately 10 years and ensure this provides value in delaying roof works.		COMPLETE	<ul style="list-style-type: none"> Costings for works identified from survey to be costed by the planned works contractor using the SOR and existing contracts.
On an 'asset by asset' basis, either undertake the remedial works or replace the roof.		NOV 2024	<ul style="list-style-type: none"> Commence s20 stage 3 consultation process once approved by Cabinet. Programming of works with contractor(s) Commence works on site.

<p>If remedial works are progressed, TBC should consider if other works can be undertaken while the access equipment is in place.</p>			<ul style="list-style-type: none"> • Work with contractor and condition data to identify additional works.
<p>Advise residents of the proposed remedial works programme and likely timescale for roof renewal.</p>		<p>MAR 2025</p>	<ul style="list-style-type: none"> • Commence s20 stage 3 consultation process once approved by Cabinet. • Programming of works with contractor(s) • Commence works on site. • Publish advance programme once 5-year capital budgets have been agreed and stock condition data is available.
<p>Review the condition of the roofs in five to seven years to assess the point renewal will be needed.</p>		<p>5-YEARS</p>	<ul style="list-style-type: none"> • Identify current condition of roofs through regular updates of condition data. • Diarise specific inspections through housing management system.
			<p>Planned Activities for next period</p>
<ul style="list-style-type: none"> • Strategic review complete by Campbell Tickell. • Specific roofs inspected and works schedules produced/costed. • Revised suite of documents produced by Campbell Tickell 	<ul style="list-style-type: none"> • Production of policy • Update of website • Review of Leases • Commence works programme • Completion of Stock Condition Survey • Development and publication of planned works programme based on new condition survey 		
<p>Amber/Red Areas</p>			<p>Risks including Stakeholder Issues</p>
<ul style="list-style-type: none"> • All workstreams are currently on track. 	<ul style="list-style-type: none"> • Financing options likely to be challenged • Leaseholders may still challenge process through the First Tier Tribunal 		
<p>Project Team Issues</p>			<p>Resourcing Requirements</p>
<p>None at this time</p>	<ul style="list-style-type: none"> • Use of Campbell Tickell to develop policy documents • Shared legal service to review current leases 		

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| | <ul style="list-style-type: none">• Shared legal service to advise on options to include management fee• Training and future support needs to be identified. |
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