

Policy Name	Property and Care Charging Policy
Version No.	1
Approval Date	March 2020
Category	Directorate
Classification	Public

<b>Property (Home) &amp; Care Charging Policy</b>	
Authors	Income Manager and Head of Compliance and Improvement
Contributors	Executive Director Corporate Resources, Head of Finance, Head of Assurance, Head of Innovation and Wellbeing, Head of Commissioning and Growth and Head of Operations (Commercial).
Review Frequency	3 years or any change in relevant legislation.
Approved By & Date	March 2020
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### Version Control

Version	Date	Description	Updated By	Approved By
1.0	21/01/2020	First draft – for ELT	Income Manager	ELT
1.1	21/01/2020	Draft for approval of the Board	Income Manager	Trustees

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## 1. Policy Purpose & Aim

The purpose of this policy is to establish the methods used in calculating both property related charges for residential properties owned and managed by the ExtraCare Charitable Trust (ExtraCare), and charges for care and additional service across all locations managed by ExtraCare.

This policy details:

- Our overall approach to setting property charges for general needs tenants, shared owners and leaseholders. This includes properties owned by our Partners where we have charge setting responsibilities to provide a fair, transparent and consistent method of calculating affordable property, care and additional service charges, for residents.
- How for our locations captured within Customer Portal, we will increase other charges including Care and Additional services (such as housekeeping and laundry); and-
- the differences in the setting process for Variable service charges & Fixed charge locations.

ExtraCare recognises that not setting charges correctly can leave the organisation open to challenge by residents, the first-tier tribunal or the Regulator for Social Housing (RSH).

## 2. Objectives

ExtraCare's Property and Care Charging policy focuses on the following objectives, to:

- To set property rent levels and service charges in line with current government guidance and best practice;
- To communicate with residents about charges in line with the ARCO Consumer Code;
- Ensure, so far as is reasonably practicable, that the risk associated with charge setting will be managed in compliance with Commonhold and Leasehold Reform Act 2002, Housing Act 1988,1996,2004, and any other relevant legislation that may impact upon it;

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- To support a consistent and collaborative approach through each stage of charge setting for a new village development- namely planning, construction, commissioning and operations;
- To ensure that the introduction of new charges or services are to only be considered following a thorough risk/benefit analysis has been performed, approved by board and consultation with residents.
- To work in partnership with staff, residents, contractors, housing partners to deliver this policy, and;
- To provide transparency of rent and service charge setting and promote equality of residents.

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### 3. Scope of Policy

This policy covers:

- Charges for residential properties owned and managed by ExtraCare; and
- Charges for care and additional service charges across all locations managed by ExtraCare.

This policy covers tenants, shared owners, and leaseholders. It also includes properties owned by our Partners where we have charge setting responsibilities. This policy does not cover charges for retail units within our locations.

This policy covers charges within our locations that are captured in the Customer Portal Pricing Catalogue including Care and Additional services (such as housekeeping and laundry).

All other charges or prices are covered by the ExtraCare's Lifestyle Services Charging Policy.

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#### 4. Responsibilities

All Trustees, employees, volunteers, sub-contractors, visitors and residents have legal duties and responsibilities to comply with the requirements of this policy and the rules and regulations set out by ExtraCare. Detailed responsibilities are set out below:

**Trustees** – To approve final charge for new development.

**ELT** – to approve, as part of the budget setting process, any increase in charges covered by this policy. No increase should be put in place without that approval.

To also approve new services in Fixed Charge locations.

**Operations Directorate**-To be responsible for correctly coding all expenditure, and also checking that all income expected has been received. To provide the necessary information for efficient budgeting setting within agreed timescales with Finance and Income Management Team. When introducing a new charge, contract or additional staffing requirements at fixed charge locations that may have an impact on resident's charges, full approval by Executive Director for Operations must be obtained.

**Asset and Maintenance Teams** - To record and cost appropriately any planned, cyclical works or other works associated with the management and maintenance of the building so as to enable the Income Management Team (IMT) to efficiently set charges for residents by IMT.

**Location Staff** - To record all relevant staffing costs and requirements are recorded using the correct expenditure codes so as to support budgeting and setting of resident charges.

**Income Management** - To ensure that resident finance groups have been consulted and proposed charges agreed ready for implementation. To take responsibility for providing the charges for the pricing catalogue to the product owner within sufficient timescales. To ensure that all price increase notifications are sent to residents within the correct timescales.

**Head of Innovation and Wellbeing** - to be considered and consulted on new services and improvements in aligned with this policy.

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**Development & Commissioning Teams** - To ensure that the full build specification has been relayed to the relevant teams and that areas/ items which may present a challenge with regards to charge setting are discussed fully with the relevant teams.

To ensure any new services in development or modernisation are approved as per this policy.

**Sales & Housing teams** - To understand and adhere to the principles and objectives of this policy and provide Key Facts documents. To provide, review and update Key Facts documents with any changes and are presented to potential residents.

**Finance Teams** - To work in collaboration and support as business partners the, Operations Directorate, Regional Operations Managers, Location Managers, Budget Holders to ensure the efficient setting of budgets for the forthcoming year.

## 5. Monitoring & Review

ExtraCare will monitor the success of this policy in delivering its aims and ensuring that ExtraCare complies with relevant legislation will be monitored by the Head of Compliance and Improvement and the Income Manager.

- Monitoring and Review is to be undertaken as follows:
- Price Reviews to be undertaken annually by the ROM's, Head of Compliance and Improvement, Income Manager with support from finance;
- Pricing Catalogues to be Updated by the product owner accurately and in a timely manner;
- Periodic reviews by Operations to ensure that income received is covering costs incurred with support from finance;
- No new service to be launched that operates at a loss;
- Annual Increases to be approved by board.
- New Village developments to include a review of the charges as part of viability checks before board decision is made to proceed with development.
- Fixed service charge locations to be subject to annual reviews to establish if expected costs are as expected at the point they were fixed.

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- Annually we should request at increase in local authority rates in line with inflation at a minimum.
- Care charges should be benchmarked against market rates and UKHCA cost of care data annually.

Regular review of this policy will be carried out by the Income Manager and Head of Compliance & Improvement to ensure that it meets current and changing legislation.

## 6. Risk Management

If charges are not calculated on a fair, transparent and consistent basis, then ExtraCare may be exposed to an increased likelihood of challenge (from residents, First Tier Tribunal, the Housing Regulator) and a deficit in finances, should the charges not cover the expenditure.

## 7. Statement of Commitment

In enacting this policy ExtraCare will adhere to all relevant regulatory and legal requirements. Legal and regulatory requirements that ExtraCare will apply in setting rents, service charges and other charge are outlined in:

### 7.1 Residential Property Charges

#### 7.1.1 Key Principles

Property charges for all residential properties we manage should be set base on the principles set out below. Residents Property charges for new locations will be approved by board of Trustees. When increasing any property related charges ExtraCare will issue increase notification letters at least a month before the increase is to be applied.

We will be transparent with residents with regards to our charges. Our charges will be laid out clearly in a Key Facts document which will be given to individuals interested in purchasing or renting a property from ExtraCare. This is in line with the requirements of the Associated Retirement Community Operators (ARCO) Consumer code-

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<https://www.arcouk.org/sites/default/files/The-ARCO-Consumer-Code-2017.pdf>

We will apply our charges fairly and consistently and in line with our lease and tenancy agreements.

ExtraCare is not responsible for setting property charges at Reeve Court, Yates Court, Brunswick Gardens, or social rented properties at Rooftop Housing Group.

ExtraCare have a number of charge descriptors for their residential property charges, the table below shows the type of charges and their description.

Location	Charge Descriptor
Bournville Village, Brunswick Gardens, Earlsdon Park, Hagley Road, Humber Court, Lark Hill, Lovat Fields, New Oscott, Pannel Croft, Reeve Court, Rosewood Court, Shenley Wood, St Oswalds, Sunley Court, Yates Court, Verona Court	Rent Service Charge Management & Maintenance Amenity Charge Community Charge

Location	Charge Descriptor
Longbridge Village, Hughenden Garden, Stoke Gifford, Wixams Village	Rent Village Facilities Apartment Maintenance Utilities Village Amenities

### 7.1.2 Social Rents (Formula Rent)

Social Rents are based on a formula set by Government. The Formula Rent is calculated taking account of the estimated capital value of the property, the number of bedrooms and local average earning levels. In line with Government regulations, as a supported housing provider, ExtraCare rent levels for Supported Housing are set also on the basis of formula rent, plus an additional 10%.

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/313355/14-05-07\\_Guidance\\_on\\_Rents\\_for\\_Social\\_Housing\\_Final\\_.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/313355/14-05-07_Guidance_on_Rents_for_Social_Housing_Final_.pdf)

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### 7.1.3 Service Charges

#### ***Variable Service Charge***

The setting and changing of these charges will comply with the Section 153 of the Commonhold and Leasehold Reform Act 2002.

Variable service charges are set based on ExtraCare providing an estimate of the costs of providing the services, and in collaboration with our resident Finance groups increases/decreases for the forthcoming year are discussed and agreed. This charge will include, but not be limited to, the cost of staffing, repairs, communal cleaning, cyclical maintenance, depreciation, utilities and a provision for central overheads. This will usually take place in August-October each year in order to feed into the following year's budget.

Residents will be provided with service charge accounts for their location. Variable service charges collected in excess of the costs we incur will be actioned as per the lease agreement or act as surplus to offset any future years where the estimated charge fail to meet the costs we incur for the services provided to residents. This surplus will be clearly reported to each variable location in our services charge statement and will be held as a creditor in our accounts.

Residents will be consulted via the appropriate legal notification process where changes are proposed to services provided, or the basis for charging them.

#### ***Section 20***

Where ExtraCare proposes to carry out repair or improvement works that would cost each payer of a variable service charge more than £250 we will either: consult with all leaseholders liable to be charged, or in the event of urgent works, carry out the repairs and then seek permission from the Leasehold Valuation Tribunal to charge for the works subsequently. Where ExtraCare proposes to enter into a contract for longer than twelve months that would cost any payer of a variable service charge more than £100 a year, then we will consult with

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those liable to be charged. The legal requirements of these consultation processes are set out in the Landlord and Tenant Act 1985 as amended.

### **Fixed Charge**

The setting of Fixed charges is based on expected costs and is calculated at the financial appraisal stage of a proposed new development. These charges are not covered by Variable service charge legislation.

Fixed charge will not be increased, or refunded, to reflect costs incurred. They will be reviewed annually in line with the provision contained within the lease/tenancy. This would normally be an annual increase linked to the CPI figure for September of the previous year. A table of all increase terms is contained in Appendix B.

Fixed service charges collected in excess of the costs we incurred in providing services to residents will be added to ExtraCare reserves. ExtraCare will cover the deficit in instances where collected fixed charge do not cover the costs we incurred for the services provided to residents.

There is no legal requirement to consult residents on increases to fixed charges. However, should this requested by residents of fixed charge locations, ExtraCare will hold annual budget meetings with residents at such locations and obtain direct feedback on the services provided.

#### **7.1.4 Management & Maintenance or Apartment Charge**

Leaseholders pay a Management & Maintenance Charge which is a separate charge based on residents entering into an agreement for the maintenance of certain internal parts of their property. This will include the buildings insurance element for their apartment albeit the obligation to insure the property remains in the lease and is the responsibility of ExtraCare.

This is set and reviewed in line with the leases and is consistent with the approach to variable and fixed service charges. Details are contained in Appendix A & B.

#### **7.1.5 Amenity or Utilities Charge**

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The Amenity or Utilities Charge is the cost of supplying and managing the supply of water, gas, (if applicable) electricity and heating to the property and all properties in the Village. There is a single supply of all the utilities and therefore the total charge for each utility is split between all properties on the development and recovered by way of an Amenity/Utilities Charge.

This is set and reviewed in line with the leases and is consistent with the approach to variable and fixed service charges. Details are contained in Appendix A & B.

### **7.1.6 Community/ Village Amenities Charge**

The Community Charge/ Village Amenities charge is a contribution towards the cost of funding all the Communal Facilities and the activities provided by ExtraCare at the location (including the well-being service, the cost of the activities programme, catering, and to ensure staff are available to provide 24-hour emergency warden call services) in the location. This includes the cost of employing the staff to support such services.

The Community Charge/ Village Amenities charge is a fixed charge and where collected in deficit of the services provided ExtraCare will cover the costs we incurred. If the charge is in excess of the costs we incurred in providing services to residents, this will be added to ExtraCare reserves.

The contribution will be set at the start of an individual's tenancy or lease and will reviewed annually based on the table in Appendix A & B. This means ExtraCare may have residents on different rates of Community Charge, and some long-standing residents paying no charge at all.

### **7.1.8 Location Investment Contribution**

Location Investment Contribution is the new name (previously known as the sinking fund contribution) for the payment made when a leaseholder sells their property back to ExtraCare. ExtraCare will collect 1% of the price paid at purchase for each year of occupation (apportioned based on complete months) since the resident moved into the property up to a maximum of 10 years.

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Charges for local authority funded care will be raised in line with payment levels agreed with the local authority. ExtraCare aims to negotiate rates with the local authority which support substantial recovery of the services provided. Annually as a minimum, ExtraCare will request an increase in local authority rates in line with inflation.

Charge setting for self-funded care, and additional services, will always be set to recover the cost of the service incurred. The charges for care in new services or any increases to care charges should be approved by ELT.

ExtraCare will review the rate we charge for care annually (although the care contract does allow this review to be more frequent).

Where we have designated staff for Care purposes and they are required to perform additional duties such as housekeeping, bathing, accompanied visits, that charge will be set at the care rate for that location. Where these additional services are not undertaken by Care Staff, they will be set at a level to, at a minimum, recover the costs of providing these services.

### **7.3 Collection of Charges**

The majority of our charges are set weekly and wherever possible are collected weekly electronically via Direct Debit or Standing Order. Charges for Hughenden Gardens, Stoke Gifford, Wixams, Solihull and all new future villages are calculated as a monthly charge and are collected monthly via electronic payment.

ExtraCare will aim to collect all charges electronically ensuring a full audit trail whilst making it easier and more efficient for our residents to pay their charges. ExtraCare Income Management Policy will cover the management of arrears recovery for outstanding resident charges.

### **7.4 Rechargeable Repairs and Recovery of Costs due to Damage**

For the purposes of this policy a repair is anything identified as ExtraCare's responsibility by the Management & Maintenance Agreement or tenancy agreement. We will seek to recover the costs of the following:

- Repairs which arise as a result of misuse of the property.

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- Repairs which arise as a result of neglect.
- Repairs arising as a result of alterations to the property where written permission wasn't granted.
- Repairs arising from deliberate and intentional damage to the property caused by a resident, a member of their household or visitor.

ExtraCare will seek to recover costs by the most cost effect measure possible. For leaseholders and shared owners these costs will usually be collected at surrender stage, as per the lease agreement.

For tenants, shared owners and leaseholders we may provide repairs beyond our responsibilities in the Management & Maintenance Charge or tenancy at a pre-agreed charge to residents. The charges for services are covered by ExtraCare's Pricing Policy.

For the purposes of this policy we define significant damage as damage that goes beyond typical wear and tear and that results rectification works being needed beyond a typical repair. This maybe be, but not restricted to flooding, fire or damage to wall or floors.

Where ExtraCare incurred costs to rectify significant damage caused to one or more properties or to communal areas as a result of any intentional act or gross negligence by a resident, a member of their household or their visitor, ExtraCare will always aim to recover these sums of money that cannot be recovered via an insurance claim. Where damage is caused via an accidental action, we would only expect to recover the cost up to £100.

If a recharge is disputed by the residents, then they are encouraged to use the Complaints process.

## 7.5 Introducing New Charges

Where residents' charges will be impacted by the introduction of a new charge, a new contract or additional staffing requirements at a location, If approval is granted, then consultation must be carried out with residents to gain a majority vote on the proposal. The need to consult with the local authority must also be considered due to Housing Benefit implications, this will be led by the Income Manager. There may also be a requirement to apply to the First Tier Tribunal to make the necessary adjustments to the lease agreements. Separate arrangements must also be made to amend existing tenancy agreements.

## 7.6 Other Charges



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This policy covers both property related charges for residential properties owned and managed by the ExtraCare Charitable Trust (ExtraCare), and charges for care and additional service across all locations managed by ExtraCare. Charges not covered in this policy, not an exhaustive list, include meals within ExtraCare Bistro/Restaurants, Food and Beverages Retail Units, Gyms are covered within ExtraCare General Pricing Policy.

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## 8. Other Relevant ExtraCare Policies & Documents

<b>General</b>	<ul style="list-style-type: none"> <li>Income Management Policy</li> <li>Lettings Policy</li> <li>Income Management Strategy</li> <li>Financial Regulations</li> <li>ExtraCare Pricing Policy</li> </ul>
Association of Retirement Housing Managers	( <a href="https://www.arhm.org/publication-category/code-of-practice/">https://www.arhm.org/publication-category/code-of-practice/</a> )
The Associated Retirement Community Operators	<ul style="list-style-type: none"> <li><a href="https://www.arco.uk/arco-consumer-code">https://www.arco.uk/arco-consumer-code</a></li> </ul>

## 9. Relevant Legislative & Regulatory Requirements

Legislation	Regulation	Guidance
Landlord and Tenant Act 1985 as amended by the Commonhold and Leasehold Reform Act 2002  Housing Act 1988; Housing Act 1996; Housing Act 2004; Guide to Social Rent Reforms 2001; Annual TSA circulars on rent setting; The Welfare Reform and Work Bill. Leasehold Reform, Housing and Urban Development Act 1993 (the 1993 Act).	<ul style="list-style-type: none"> <li>RSH Rent Standard</li> <li>RSH Rent Standard Guidance</li> <li>Landlord and Tenant Act 1985</li> <li>Housing Act 1988</li> <li>Regulatory Reform (Assured Periodic Tenancies) (Rent Increases) Order 2003</li> <li>Welfare Reform and Work Act 2016</li> <li>The Social Housing Rents (Exceptions and Miscellaneous Provisions) (Amendment) Regulations 2016 and 2017</li> </ul>	

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### Appendix A- Charge Table- Variable Service Charge Locations

Variable Locations	Social Rent 1 Bed Standard	Social Rent 1 Bed Large	Social Rent 2+ Bed	Shared Owner Rent	Service/ Facility Charges	Amenity Charges 1 Bed std	Amenity Charges 1 Bed lge	Amenity Charges 2+ Bed	Amenity Charges Cottage	Community Charges 1988	Community Charges 2016	Community Charges 2017	Community Charges 2018	Community Charges 2019	Management Apartment Maintenance Charge	HRS Support	Ground Rent	Estate Management	SF Care ( Hour)
Bournville Gardens Village	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	CPI (1.7%)	Agreed with RF Group	N/A	N/A	CPI (1.7)	£20.40				
Earlsdon Park Village	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	CPI (1.7%)	Agreed with RF Group	N/A	N/A	N/A	£18.30				
Hagley Road Village	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	CPI (1.7%)	Agreed with RF Group	N/A	CPI (1.7)	N/A	£20.40				
Humber Court	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	CPI (1.7%)	Agreed with RF Group	N/A	N/A	N/A	£20.40				
Lark Hill Village	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	CPI (1.7%)	Agreed with RF Group	N/A	N/A	N/A	£20.40				
Lovat Fields Village	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	CPI (1.7%)	Agreed with RF Group	N/A	N/A	N/A	£22.40				
New Oscott Village	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	CPI (1.7%)	Agreed with RF Group	N/A	N/A	N/A	£20.40				
Pannel Croft Village	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	CPI (1.7%)	Agreed with RF Group	N/A	N/A	N/A	£16.30				
Shenley Wood Village	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	CPI (1.7%)	Agreed with RF Group	N/A	N/A	N/A	£22.40				
St Oswalds Village	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	Agreed with RF Group	CPI (1.7%)	Agreed with RF Group	N/A	N/A	N/A	£18.30				

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Appendix B- Charge Table- Fixed Charge Locations

Fixed Locations	Social Rent 1 Bed Standard	Social Rent 1 Bed Large	Social Rent 2+ Bed	Shared Owner Rent	Service/ Facility Charges	Amenity Charges 1 Bed std	Amenity Charges 1 Bed lge	Amenity Charges 2+ Bed	Community Charges 1988	Community Charges 2016	Community Charges 2017	Community Charges 2018	Community Charges 2019	Management Apartment Maintenance Charge	Sinking Fund	Ground Rent	Estate Management	SF Care ( Hour)
Brunswick Gardens Village	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	£20.40
Hughenden Gardens Village	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7%)	Cornwall	Cornwall Index	Cornwall Index	CPI (1.7%)		N/A	N/A	£22.00					
Longbridge Village	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7%)	Cornwall	Cornwall Index	Cornwall Index	CPI (1.7%)		N/A	N/A	£20.40					
Reeve Court Village	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	£18.30
Rosewood Court	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	Y	N/A	N/A	£22.40
Stoke Gifford Village	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7%)	Cornwall	Cornwall Index	Cornwall Index	CPI (1.7%)		N/A	N/A	£22.40					
Sunley Court	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	CPI (1.7%)	Y	N/A	N/A	£22.40
Verona Court	CPI (1.7) +1%	CPI (1.7) +1%	CPI (1.7) +1%	N/A	No Change	No Chang	No Chang	No Chang	N/A	N/A	N/A	N/A	N/A	N/A		N/A	N/A	£18.30
Yates Court	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	£20.40

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Activity	Who	Frequency
To approve final property Charges for new developments.	Trustees –	When New site identified.
To ensure that the full build specification has been relayed to the relevant teams and that areas/ items which may present a challenge with regards to charge setting are discussed fully with the relevant teams.	Development & Commissioning Teams	When New site identified.
New services and improvements that may impact on resident charges	Head of Innovation and Wellbeing	Consideration of New services or improvements
To record and cost appropriately any planned, cyclical works or other works associated with the management and maintenance of the building so as to enable the Income Management Team (IMT) to efficiently set charges for residents by IMT.	Asset and Maintenance Teams	New Site Identification and annually
To be responsible for correctly coding all expenditure, and also checking that all income expected has been received. To provide the necessary information for efficient budgeting setting within agreed timescales with Finance and Income Management Team. When introducing a new charge, contract or additional staffing requirements at fixed charge locations that may have an impact on resident's charges, full approval by Executive Director for Operations must be obtained.	Operations Directorate-	Ongoing
Location Staff - To record all relevant staffing costs and requirements are recorded using the correct expenditure codes so as to support budgeting and setting of resident charges.	Location Staff	Ongoing
To ensure that resident finance groups have been consulted and proposed charges agreed ready for implementation. To take responsibility for providing the charges for the pricing catalogue to the product owner within sufficient timescales. To ensure that all price increase notifications are sent to residents within the correct timescales.	Income Management Team	Annually
Sales & Housing teams - To understand and adhere to the principles and objectives of this policy and provide Key Facts documents. To provide, review and update Key Facts documents with any changes and are presented to potential residents.	Sales & Housing Teams	Ongoing
To work in collaboration and support as business partners the, Operations Directorate, Regional Operations Managers, Location Managers, Budget Holders to ensure the efficient setting of budgets for the forthcoming year.	Finance Teams	Ongoing