

# Homeowner Management Policy

## Summary

This policy explains how Portsmouth Homes manages services for homeowners.

It applies to homeowners who have a lease, transfer document or other legal agreement with Portsmouth City Council or Portsmouth Homes. This may include leaseholders, shared owners and freeholders who are responsible for paying service charges or other property-related charges.

The policy explains our approach to managing homeowner services, including communication, responsibilities, repairs, service charges, permissions, engagement, complaints and support.

This policy should be read alongside the Homeowner Major Works and Reserve Funds Policy, which explains how we manage major works, reserve funds and related charges.

Your lease, transfer document or legal agreement remains the key document that sets out your rights and responsibilities. If there is any difference between this policy and your legal agreement, the legal agreement will take priority.

## Effective date

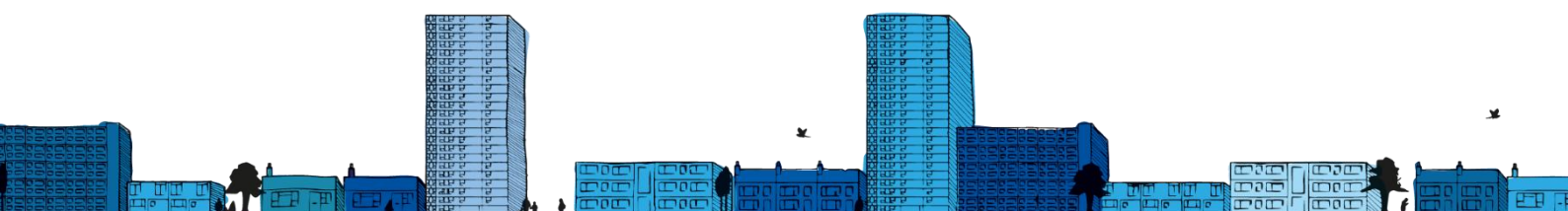
Example text

## Review

We will review this Policy every 3 years or when there has been an update to legislative, regulatory, best practice or operational changes.

## Version

Version 1.0



# Homeowner Management Policy Contents

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# Who this policy applies to

This policy applies to homeowners who receive services from Portsmouth Homes or who may be responsible for paying charges under a lease, transfer document or legal agreement.

This may include:

- Leaseholders
- Shared owners
- Freeholders who pay estate or communal charges
- Homeowners who purchased their home through Right to Buy or another home ownership scheme
- Homeowners who sublet their property, where this is allowed under the lease or legal agreement

Any reference in this policy to “we”, “our” or “us” means Portsmouth Homes.

Any reference to “homeowner” means a leaseholder, shared owner, freeholder or other owner who has responsibilities to Portsmouth Homes under a legal agreement.

# Why we have this policy

We have this policy to explain how we will manage homeowner services in a fair, clear and consistent way.

It explains:

- What homeowners can expect from us
- What we expect from homeowners
- How we manage buildings, shared areas and estate services
- How we communicate and consult
- How service charges and related charges are managed
- How homeowners can request information, permissions or support
- How homeowners can raise concerns or complaints
- How we will learn from feedback and improve services

Our aim is to make homeowner services clear, accessible and easy to understand.

# Our approach to homeowner services

We will manage homeowner services in a fair, respectful and transparent way. We will listen to homeowners, treat people fairly and consistently and explain how decisions are made. We



will provide information in plain English and make it available in alternative formats where needed.

We will be open and accountable about how services are delivered, how charges and decisions are managed, and how homeowners can raise concerns, challenge decisions or provide feedback.

We will work with homeowners, listen to what they tell us and use their feedback to help improve services. We will seek to deliver value for money by balancing quality, safety, legal requirements and the long-term management of homes and estates.

We will also use performance information, complaints, compliments, feedback and engagement activities to learn, improve and continuously develop our services.

## Our responsibilities

We will:

- Manage buildings, estates and communal areas where we have responsibility to do so.
- Deliver services in line with lease agreements, transfer documents and other legal agreements.
- Provide clear information about charges, services, responsibilities and service standards.
- Communicate openly about matters that affect homeowners.
- Carry out consultation where required by legislation or legal agreements.
- Manage service contracts, contractors and suppliers appropriately.
- Respond to enquiries, concerns and complaints fairly and consistently.
- Provide opportunities for homeowners to influence and help shape services.
- Consider individual communication and accessibility needs.
- Keep accurate records and process information in line with data protection requirements.
- We will monitor contractor performance, quality and compliance and take action where standards are not met.

## Your responsibilities

You are responsible for:

- Complying with the terms of your lease, transfer document or legal agreement.
- Paying charges that you are responsible for under your legal agreement.
- Maintaining any parts of your home that are your responsibility.



- Obtaining permission before carrying out alterations where required.
- Reporting repairs or concerns that may affect communal areas, the building or neighbouring homes.
- Allowing access where it is reasonable and necessary.
- Being considerate of neighbours and the wider community.
- Keeping your contact details up to date.

Your lease, transfer document or legal agreement remains the main document setting out your legal rights and responsibilities.

## Managing Homes, Buildings and Estates

We provide a range of services to help manage and maintain buildings, estates and shared areas. Information about the services provided to your building, block or estate will be made available through service charge information, service specifications and other supporting information where applicable.

Sometimes we may not be responsible for providing the Management Services to a building or Estate, and these are provided by 3<sup>rd</sup> party Management Agencies under the original Lease Agreements. Portsmouth Homes is still responsible for collecting the charges for these services and for ensuring that the Managing Agents provide the services to a good standard and provide value for money.

These services may include:

- Communal repairs and maintenance including Improvements and Major Works programmes
- Estate management.
- Grounds maintenance.
- Cleaning of communal areas.
- Lighting and security arrangements.
- Lift, door entry and other communal systems.
- Safety inspections and compliance activities.
- Management of shared facilities and communal assets.
- The services provided will vary depending on the type of property and the terms of the legal agreement.

We will provide information to help homeowners understand which services and responsibilities fall to Portsmouth Homes, a managing agent or the homeowner.



# Repairs and Maintenance

We are responsible for repairs and maintenance where this is required by the lease, transfer document or legal agreement.

Responsibilities vary depending on the type of home and legal agreement in place.

Where Portsmouth Homes is responsible for repairs, we will manage these in accordance with our Repairs and Maintenance Policy and related procedures. This includes compliance improvements and repairs introduced by the Building Safety and Fire Safety Acts. This may include replacement front doors, upgrading fire alarm detection and other works to meet new regulations and requirements.

Homeowners remain responsible for maintaining any parts of the property that fall within their own repairing obligations.

## Service charges

Some homeowners contribute towards the cost of providing services, maintaining communal areas or managing shared buildings and estates.

We will:

- Provide service charge information, statements and supporting information in accordance with legal requirements and our service charge processes.
- Provide information about services delivered.
- Seek to ensure charges are reasonable and in line with legal requirements and the relevant legal agreement.
- Review services and costs to help ensure value for money.
- Some services may be provided by third-party managing agents. Where this applies, we will oversee these arrangements and work with the managing agents to help ensure services are delivered to a good standard and provide value for money.

## Major works and reserve funds

Major works and reserve funds are managed under our dedicated Homeowner Major Works and Reserve Funds Policy.

That policy explains:

- How major works are planned and managed.
- How reserve funds operate.
- Consultation arrangements.
- How costs may be recovered.



- Support available to homeowners.
- Rights to challenge charges where permitted by law.

This policy should be read alongside the Homeowner Major Works and Reserve Funds Policy.

## Subletting, sales and changes in ownership

Homeowners may wish to sell their home, transfer ownership or sublet their property, subject to the terms of their lease, transfer document or legal agreement.

Where required, homeowners must tell us about changes in ownership, contact details or occupancy arrangements so that our records remain accurate and we can communicate with the correct person.

Freeholders, Leaseholders and shared owners should check the terms of their legal agreement before selling, transferring ownership or subletting their property, as specific conditions may apply.

We will provide information about any responsibilities, permissions or requirements that apply and will process requests in a fair and consistent manner.

We encourage homeowners to contact us as early as possible if they are considering selling, subletting or making changes to ownership arrangements so we can explain the relevant process and requirements.

Homeowners also need to check their lease, transfer documents or legal agreements before arranging for a For Sale sign to be erected, as some leases, Managing Agent Agreements or transfer documents may not permit these.

## Permissions and alterations

Homeowners may need our permission before carrying out certain alterations, improvements or changes to their property.

Requirements will vary depending on the terms of the lease, transfer document or legal agreement.

Examples may include:

- Structural alterations.
- New Kitchens and Bathrooms
- Removal of internal doors (fire doors)
- Extensions or additions.
- Changes affecting communal services.
- Installing hard flooring where restrictions apply.



- Installing external equipment or fixtures.
- Electric vehicle charging equipment.
- Other works that require consent under the legal agreement.

Homeowners should contact us before carrying out works where permission may be required.

We will consider requests fairly and consistently and explain any conditions or requirements that may apply.

Where your lease, transfer document or legal agreement allows, we may charge reasonable administration fees for services such as permissions, approvals, notices, information requests or legal processes. We will provide information about any applicable fees on request.

## Building safety and compliance

We are committed to maintaining safe homes and buildings.

Where we have responsibility to do so, we will manage relevant safety and compliance activities which may include:

- Fire safety.
- Lift safety.
- Electrical safety in communal areas.
- Water hygiene.
- Asbestos management.
- Building safety requirements.
- Other legal and regulatory obligations.

Homeowners also have responsibilities for maintaining any parts of their home that fall within their own ownership and under some circumstances Portsmouth Homes will be responsible for carrying out compliance works where it is considered necessary and deemed part of the fabric of the building.

## Managing neighbourhoods and shared areas

We want our neighbourhoods, estates and shared spaces to be safe, clean and well-maintained places where people are proud to live.

We will manage communal areas and shared facilities where we are responsible for doing so and will work with residents, homeowners and partner organisations to help maintain welcoming and sustainable neighbourhoods.

This may include:



- Maintaining communal grounds and open spaces.
- Cleaning and maintaining shared areas.
- Managing communal facilities and equipment.
- Responding to environmental concerns where we are responsible for doing so.
- Working with residents and partner organisations to help address estate management issues.

Homeowners are expected to use communal areas responsibly, respect their neighbours and comply with any requirements contained within their lease, transfer document or legal agreement.

Where concerns are reported about shared areas, estate services or neighbourhood management, we will investigate and take appropriate action in line with our policies, procedures and legal responsibilities.

We welcome feedback from homeowners and residents and will use this information to help improve services and neighbourhoods where possible.

Some of these services may be provided by 3<sup>rd</sup> Party Management Agencies, where Portsmouth Homes will manage these providers and try and ensure that the services are good quality and provide value for money.

## Communication and Information

We recognise the importance of clear and transparent communication.

We will:

- Provide clear information about services, charges, responsibilities and how decisions are made in a clear and accessible way.
- Respond to reasonable requests for information.
- Explain decisions which affect homeowners.
- Communicate significant changes that may affect services.
- Consider individual communication needs and reasonable adjustments where required.

Provide information about complaints, disputes and tribunal rights where applicable.

- Provide homeowners with information to help them understand their rights, responsibilities, charges and services. This may include guides, factsheets, service charge information, consultation documents and information about independent advice and dispute resolution services.
- Where works may affect homeowners, we will provide information about the nature of the works, expected timescales, potential disruption and how updates will be provided.
- We will publish service standards and information about how homeowners can contact us, what response times they can expect and how services are delivered.



# Support and Accessibility

We recognise that homeowners may have different communication, accessibility or support needs.

We will:

- Make reasonable adjustments where required.
- Provide information in accessible formats where appropriate.
- Allow homeowners to be supported by an advocate, representative, family member or support worker where appropriate.
- Work to ensure services are accessible and inclusive.

This section aligns well with the Regulator for Social Housing Transparency, Influence and Accountability Standard expectations around accessibility, engagement and clear communication

## Complaints, Challenges and Disputes

We aim to resolve concerns as early as possible.

If a homeowner is unhappy with the standard of service they have received, they can raise a complaint through our complaints process.

Some disputes relating to leases, service charges, consultation requirements or the interpretation of legal agreements may be considered by the First-tier Tribunal or other appropriate bodies.

We will provide information about available routes for raising concerns, seeking independent advice or challenging decisions where appropriate.

This reflects Housing Ombudsman learning around signposting residents to the correct route when issues relate to service quality, service charges or legal disputes.

## Monitoring and Assurance

We will use performance information, audits, complaints, compliments, resident feedback and other assurance activities to monitor the effectiveness of homeowner services.

We will use this information to identify learning, improve service delivery and help ensure we continue to meet legal, regulatory and organisational requirements.

## Your voice

We provide residents a wide range of meaningful opportunities to engage, influence and scrutinise the Landlord Strategies, policies and services, to include participation in regular resident meetings and give feedback on services and policies.



If you would like to be included in future resident engagement focus groups and would like to know how to get involved, please contact us for more information:

You can contact our team by:

- Email: [housing.engagement@portsmouthcc.gov.uk](mailto:housing.engagement@portsmouthcc.gov.uk)
- Phone: 02392 834835
- Website: visit the [Resident engagement and community resources on our website](#)

## What have we done to make sure this Policy is fair?

We completed an Integrated Impact Assessment (IIA) to consider the positive and negative impacts this Policy may have on people with protected characteristics under the [Equality Act 2010](#). This Policy should have direct and positive equality and diversity impacts.

## Regulation and legislation

We recognise the variety of legislation, and we will continue to monitor relevant legal guidance. The list below reflects some of the existing legal framework and relevant publications:

- Landlord and Tenant Act 1985
- Landlord and Tenant Act 1987
- Housing Act 1985
- Housing Act 1996
- Leasehold Reform, Housing and Urban Development Act 1993
- Law of Property Act 1925
- Commonhold and Leasehold Reform Act 2002
- Building Safety Act 2022
- Social Housing Regulation Act 2023
- Leasehold and Freehold Reform Act 2024, where provisions are in force
- Equality Act 2010
- Data Protection Act 2018
- UK General Data Protection Regulation
- Debt Respite Scheme Regulations 2020
- Housing Ombudsman Complaint Handling Code
- Regulator of Social Housing Consumer Standards



## Related documents

This policy should be read in conjunction with:

- [Portsmouth Homes policies, strategies and reports](#)
- Leasehold Agreement
- Transfer Document
- Legal Agreement

## How to feedback

If you have any questions around the policy or would like to know more about its application, please contact the relevant service in the first instance.

You can get this policy in large print, braille, audio or in another language by contacting your Housing Office. More information is available [translation, interpreting and audio information](#).

## Compliments

To help us provide the best service we can. We would like to hear customer views on the services that they use. If the customer is pleased with a member of staff or service, please let us know.

- Telephone: 02392 606383
- Email address: [HNBLandlordComplaints@portsmouthcc.gov.uk](mailto:HNBLandlordComplaints@portsmouthcc.gov.uk)

## Complaints

If a customer is unhappy, they can refer to our Landlord Complaints Policy.

- Online complaint form at [Make a housing complaint](#)
- Telephone: 02392 606383
- Email address: [HNBLandlordComplaints@portsmouthcc.gov.uk](mailto:HNBLandlordComplaints@portsmouthcc.gov.uk)

## Housing Ombudsman Service

If a customer is unhappy, they can contact the Housing Ombudsman Service for advice and guidance at any time.

- Online complaint form on [the Housing Ombudsman Service website](#)
- Telephone: 0300 111 3000
- For more information, visit [Housing Ombudsman's Complaint Handling Code](#)

