



Job Title:	Leasehold and Service Charge Officer
Service Area:	Housing Investment
Team:	Housing Investment
Salary:	Band 4/5

Job Description

Main Purpose of Job:

To be the first point of contact for leaseholders, taking ownership for the performance of leasehold services income, leasehold property management, and to investigate and respond to complex queries regarding annual service charges and major works.

To maximise the council's income through effective monitoring and management of approximately 115 leaseholds (and manage the additions as portfolio increase). To be a point of contact for queries and advice, externally & internally, concerning leases, leasehold management and the liability of lessees and applicants to contribute to Council expenditure.

To effectively manage approximately 115 service charge accounts from the point of issue through to collection including setting up and monitoring payment arrangements; arrears escalation; dispute resolution and County Court action.

Our Values

You will be expected to work in line with our values which are:

Proud - Believing in who we are, what we do and where we live
Dynamic - Transforming the future with you in mind
Truthful - Honest and clear in all we do
Good Value - Delivering outstanding services, smartly & economically
United - Whoever we work with, we work as one team

Key Responsibilities:

1. Deliver a high standard of management to leaseholders, ensuring lease conditions are adhered to and statutory responsibilities to leaseholders are fulfilled.
2. Liaise with leaseholders, other officers within, and outside the Council and external organisations.



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3. Undertake Annual and non-annual service charges, including Production, apportionment and invoicing.
4. To work with staff across the business to prepare, set and manage service charge budgets for residents.
5. Deal with applications requiring permission under the lease, responding within set timescales and raising administration charges where the lease allows.
6. To ensure all invoices to be included in service charges are paid through Navision and appropriately coded to ensure their inclusion in the relevant service charge.
7. To ensure all data collected and input is accurate, to enable data driven decision making across Tenancy Services.
8. Take responsibility for dealing with all leasehold, service charge queries, signposting to the relevant service/external organisation where applicable.
9. Liaising with other housing staff or services where breaches of lease occur.
10. To work closely with the Building Maintenance team to ensure that tenants and leaseholders receive the best possible service.
11. Ensure compliance with organisational requirements for GDPR, risk management, safeguarding, Health & Safety and other legal and statutory requirements along with best practice and general duty of care.
12. In all aspects of the organisations work, promote effective communications, excellence in customer service, personal accountability and a focus on continuous improvement.
13. To undertake such other duties as may reasonably be required compatible with and/or arising from those listed above.
14. To promote and adhere to the workplace values of our organisation.
15. Understand and monitor leases and licenses. Work with the Legal Department to ensure leases are extended or terminated at the point of end date.
16. Be the sole point of contact for 113 leaseholders and assist with the management of 13 Shared ownership properties. (current figures will increase)
17. Deal with leasehold complaints, and where necessary, visit properties to gather photographic evidence.
18. Visit leasehold sites to ensure communal areas are maintained in accordance with leases.
19. Complete pre-sale forms for leasehold properties on behalf of the legal team.
20. Create leaflets, information sheets and contribute to tenancy packs giving leaseholder information on the councils and leaseholders rights and responsibilities.
21. Ensure that archived documents are scanned and saved electronically onto the system. To request missing files from land registry and arrange payment for such services.



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22. Maintain information and data on leasehold, new build and Retired Living scheme properties. Creating accounts, scanning and indexing documents onto correct accounts.
23. Complete property inspections / regular monitoring of all leases / commercial leases and leases with other housing providers
24. Monitor and keep abreast of lease renewals / service charges and ensure lease are terminated / renewed and ESC is always on in receipt of the best market value rents for properties.

Service Charge Setting

25. Set service charge estimates for all existing stock annually, complying with tenancy agreements and leases and with current legislation.
26. Liaise with the Finance to produce service charge estimates for new schemes, collating and interpreting all legal documentation to ensure service charges are set in accordance with the same.
27. Attend key stage meetings with development on new schemes, from Design Forum to Handover and in liaison with Operations Senior Surveyor and Development Project Officer identify potential concerns for service charge recovery such as unclear liabilities. Service Charge reconciliation
28. Regular reconciliation of scheme accounts on finance accounting system identifying any discrepancies and informing relevant departments to investigate and resolve.
29. Reconcile actual costs for all stock with a variable service charge and issue year end statement of accounts, complying with agreements, leases and current legislation. Service Charge Audit
30. Assist Finance in liaising with external auditors, providing resolution of queries relating to the year-end accounts.

Utilities and Partnerships

31. Monitor and pay utility bills for communal supplies and retired living schemes. Use ESC's finance system to code invoices for payment, raise purchase orders and reconcile payments.
32. Deal with any disputes or complaints regarding the supply of communal utilities, addressing these with 3rd party suppliers. Maintain accounts with meter readings.
33. Work with ESC's partnerships, ensuring contractual obligations are met and to address any issues directly with the Commercial Contractors Manager. Create and maintain forms to aid with the monitoring of work carried out by external contractors, putting any necessary procedure in place.

Section 20 Consultation



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- 34. To issue Section 20 (S.20) notices in accordance with legislation.
- 35. Undertake S.20 consultation in accordance with the procedure and timescales outlined in the legislation, issuing notices and supporting information as required.
- 36. Have a good knowledge and understanding of the S20 consultation law and procedures. To work with the Legal Department to ensure legal requirements are met.
- 37. Create and prepare correspondence as per Section 20 consultation regulations and ensure that it remains current to Section 20 consultation legislation.
- 38. Identify cases for Section 20 dispensation and prepare legal bundles for tribunal hearings on behalf of the legal department.

Recovery

- 39. Create and prepare recovery correspondence for unpaid leasehold charges, keeping templates up to date with recovery legislation.
- 40. Work with the Finance Team and Legal Department to monitor repayment and initiate further recovery action if necessary.

Other

- 41. Convert current paper maps for partnership use to electronic copies and use the GGP mapping system to provide to Housing Officers and partnerships with up-to-date maps and data.
- 42. Lead the Leaseholder project groups and update relevant officer and corporate groups on leaseholder / service charge related issues producing monthly detailed data for relevant groups when required.

Line Manager: **Operational Lead – Investment and Ownership**

Responsible for: **N/A**

Political Restriction:

This post is not politically restricted.

Note: This is a description of the job as it is constituted at April 2024 but, as the organisation develops, it may be necessary to vary the duties and responsibilities from time to time. It is the practice of the Council to periodically review Job Descriptions to ensure that they relate to the job as being performed or to incorporate whatever changes may be necessary. It is the Council’s aim to



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reach agreement to such reasonable changes with the postholder but if agreement is not possible the Council reserves the right to insist on changes to the Job Description after consultation with the postholder.



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Person Specification

	Essential	Desirable
Knowledge and Experience	<ul style="list-style-type: none"> • Knowledge of Leasehold and Service Charge Management • Knowledge of Section 20 Consultation legislation • Use of software systems in day-to-day duties. • Dealing with the public in difficult situations • Liaison with other partners and agencies 	
Skills and Abilities:	<ul style="list-style-type: none"> • Good organisational skills • Ability to work on own initiative in stressful situations. • Excellent communication skills • Ability to communicate and negotiate effectively with internal and external agencies / partners / departments as well as tenants • Display a confident, professional and friendly approach at all times • Well-developed interpersonal and written skills • Good computer literacy and a pro-active approach to further development. 	
Education and Training	<ul style="list-style-type: none"> • Minimum of 5 GCSE at grade C or above to include English and Maths or equivalent 	
Other Requirements	<ul style="list-style-type: none"> • A commitment to own development and to 	



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	<p>supporting training and development initiatives.</p> <ul style="list-style-type: none"> • The post will involve access to vulnerable adults and children on occasions. 	
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