

Service charge setting policy – version 1

Date approved for use: 1st April 2025

Scope

- 1.1 This policy is a Dimensions Group policy. This means it applies to all its subsidiaries as listed in **Dimensions Group company information**.
- 1.2 The purpose of this policy is to set out Dimensions approach to setting and reviewing service charges for all Dimensions properties where a service charge is payable.
- 1.3 We refer to ‘tenants’ throughout this policy. Some of the people we support are also Dimensions tenants.
- 1.4 You can find the documents, forms and other policies mentioned in this policy on the Hub (Dimensions intranet).
- 1.5 To go straight to the policy content click on the hyperlink section title below or go to the page:

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Policy statement

- 2.1 A service charge is a payment made by a tenant or leaseholder for services received in connection with the occupation of their home. The payment is in addition to the rent. The service charge should aim to recover all reasonable costs incurred in delivering the service from start to finish.
- 2.2 This policy sets out the key principles to setting service charges for the organisation. Service charges will always be determined by the tenancy agreement or lease in place. Where there are management agreements in place, Dimensions will stick to the responsibilities for service charges set out within each.
- 2.3 Dimensions will apply a fair and reasonable methodology (approach) for service charges including how they are apportioned (distributed) and collected. We will meet all legislative and regulatory requirements.
- 2.4 This policy runs parallel to the **Rent policy**, with consideration of Affordable Rents (see [Glossary](#)), which are set up to 80% of the market valuation and these are inclusive of service charges.

The aim of this policy is to ensure that service charges are:

- accurate – reflect the costs incurred in providing the service
- viable – ensure that sufficient income is generated from service charge income to cover relevant costs so preventing rents from subsidising services
- enabling quality services – and charges that are reasonable for the service provided
- transparent – calculation methods that are clear and accessible to all tenants, in accordance with current legislation and best practice
- fair and reasonable – are apportioned according to the services provided and the terms of the lease/tenancy agreement
- value for money – service contracts are regularly reviewed
- set at a level which makes properties lettable and affordable
- reviewed regularly in line with legal requirements, Regulator of Social Housing regulatory requirements, and best practice.

Implementing this policy

- 2.5 The responsibility for the setting of annual service charges lies with the Board.
- 2.6 The responsibility for implementing the service charge policy lies with the Chief Housing and Communications Officer.
- 2.7 Compliance with this policy will be overseen by the Chief Housing and Communications Officer and the Chief Financial Officer.
- 2.8 For the effectiveness of this policy, further assurance will be via our internal controls and internal audit checks. Financial performance will be overseen via our monthly management accounts.

The impact of not implementing this policy

- 3.1 Impact on tenants of not providing the housing-related services they need for a fair charge.
- 3.2 Financial impact of Housing Benefit restricting rent and service charges.
- 3.3 Not meeting Value for Money requirements.
- 3.4 Not meeting the requirements of our regulators, which may include:
 - The Regulator of Social Housing
 - Homes England
 - Local Authority or Health Commissioner
 - any Grant funding body
 - the Information Commissioner's Office (ICO).

Policy content

What is a service charge?

- 4.1 Service charges are payments made in addition to the rent and are used by Dimensions to recover costs of providing and maintaining services to tenants beyond the benefit of enjoying occupation of their home.

The [Government's Policy statement on rents for social housing](#), which all Registered Providers of Social Housing are required to follow outlines the following in relation to setting service charges:

- 2.35 *In addition to their rent, tenants may also pay service charges. Rents are generally taken to include all charges associated with the occupation of a property, such as maintenance and general housing management services. Service charges usually reflect additional services which may not be provided to every tenant, or which may be connected with communal facilities rather than being particular to the occupation of a dwelling. Service charges are subject to separate legal requirements and are limited to covering the cost of providing the services.*
- 2.36 *Registered providers are expected to set reasonable and transparent service charges which reflect the service being provided to tenants. Tenants should be supplied with clear information on how service charges are set. In the case of social rent properties, providers are expected to identify service charges separately from the rent charge.*
- 2.37 *Service charges are not governed by the same factors as rent. However, registered providers should endeavour to keep increases for service charges within the limit on rent changes, of CPI (as at September in the previous year) + 1 percentage point*
- 2.38 *Where new or extended services are introduced, and an additional charge may need to be made, registered providers should consult with tenants.*

- 4.2 Dimensions understands that the CPI (Consumers Prices Index) +1% is guidance rather than a requirement and will endeavour to keep service charges reasonable and affordable.

Further legal and best practice guidance in relation to service charges is in **Relevant Legal, Regulatory and Best Practice Information for Service Charges.**

Service charge principles

- 5.1 The four key principles below set out our general approach to service charge budget setting and management, so that colleagues are clear and consistent with our offer. This will support the delivery of the corporate plan, with a clear focus on financial viability.
- **We aim for all our service charges to be cost reflective, fair and value for money**
 - We will use data and our knowledge of our properties to ensure that all services and sinking fund (see [Glossary](#)) provisions are

accurately budgeted for and correctly reflected in the annual charge for tenants.

- We will correctly record and allocate all service charge costs in the ledger for each property.
- We will deliver an appropriate level of service to each property, and we will demonstrate that the services offer value for money by procuring effectively that is, going through a competitive process and benchmarking costs where possible.
- We will ensure that costs are apportioned accurately and fairly across all tenants who benefit from the service(s). Where the Tenancy agreement does not specify how we will apportion (sharing out between tenants) costs, we will seek to apportion these in a fair and reasonable way, and we will share the costs between tenants in shared property. Charges for communal areas will be split across those tenants with access to those areas.
- By fair and reasonable we mean that tenants are charged for services that are available to them, but not necessarily used by them, in accordance with their individual tenancy agreement.
- We aim to minimise annual service charge fluctuations unless a significant change to a service contract is experienced.
- We will ensure that utility meters are either Smart meters or are manually read at least twice a year to prevent the build-up of unexpected costs.
- We will charge an administration fee in addition to the direct costs of services which will cover the costs of administering service charges team, including colleague time, the IT system, invoice/statements, correspondence, communication, accounting, general overheads, debt recovery and consultation. The level of this charge will be reviewed and agreed annually.
- Sinking funds will be based on the estimated future cost of replacement and the number of years the particular component is expected to last.
- Tenants are not responsible for service charge costs attributable to unlet properties. Dimensions would be responsible for these costs until the new tenancy starts.
- We will be prudent about how we spend tenants' money and make data driven decisions for example, whether to continue to spend money repairing an asset or whether a replacement would be more cost effective.

- We will collect service charges in a flexible and effective way promoting a choice of payment methods.
- We reserve the right to subsidise charges at the authority of the Executive Team for reasons of affordability, value for money, housing management or other considerations.
- **We set and manage service charges consistently across the organisation**
 - We will benchmark the cost of providing services across similar internal properties.
 - We will monitor and manage service charge spend throughout the year via our management accounts.
 - We will use property knowledge and data to challenge over and underspend areas.
 - When assessing affordability, we will consider the whole property charge, that is, rent and service charge, use local knowledge and information such as void and sustainability data.
 - We will recover costs in line with the terms of our tenancy or lease agreements and within the responsibilities set out within any management agreement.
- **We will provide clear communication to our tenants and seek customer feedback**
 - We will be open and transparent in explaining costs associated with providing services at a property.
 - We will offer opportunities to tenants so that we can seek feedback on service quality and costs to enable us to improve how we manage contracts and services provided.
 - We will comply with all legal requirements for consultation, such as Section 20 of the Landlord and Tenant Act 1985.
 - We expect tenants to raise any concerns with us regarding service charge related issues, for example, issues relating to poor quality service so we can address them in a timely manner to ensure we are continually achieving value for money.
 - We will provide service charge accounts (for variable service charges) and budgets in an easy-to-understand format.

- We will provide easily accessible information on our website to explain our charges and what they cover.
- **We will regularly review our approach to service charge management to ensure our policy and practices are fit for purpose**
 - We will continually review and adapt our practices and approach to ensure we are in line with current legal and regulatory requirements.
 - We will utilise our networks, sector bodies and expert advisors, for example, National Housing Federation (NHF), Royal Institution of Chartered Surveyors (RICS) and consultants, to ensure that we benefit from guidance, benchmarking and learning from best practice.

Service charges at Dimensions

6.1 Dimensions operates two different service charging regimes. For its own properties these are fixed service charges and for properties managed on behalf of other landlords, these are variable service charges.

6.2 **Fixed Service Charges**

Fixed service charges are assessed annually to reflect the estimated cost of providing the services set out in the relevant tenancy agreement. If the estimates are set too low and there is an overspend, there is no provision for recouping the deficit from the tenant, so Dimensions must bear the loss. If the costs are lower than the estimates the tenant does not receive a refund of the surplus, so Dimensions keep the surplus. With fixed service charges a tenant knows exactly how much they will be required to pay on an annual basis, which helps with budgeting and affordability.

6.3 **Variable Service Charges**

The application of variable service charges is determined by the tenancy agreement, lease and the provisions within the relevant management agreement. Currently all variable service charges are through management agreements (see **Variable Service Charges Only - Key Legislation** for the list of relevant agreements).

A variable service charge is where an estimated charge is at the beginning of financial year and a final account (annual service charge statement) is produced

once the year is complete. The final account compares the actual costs in delivering services against the estimate. A surplus or deficit may be produced, and this is then adjusted in the following year's service charge budget.

Variable service charges are more complicated, having more legislation around them than fixed service charges and being more time-consuming to administer. Disputes can be taken to a tribunal.

Variable service charges to tenants will comply with sections 18 – 30 of the Landlord and Tenant Act 1985 (see **Relevant Legal, Regulatory and Best Practice Information for Service Charges**).

Variable service charges provide rights and obligations on the landlord and tenant. Dimensions will abide by the following rights and obligations for tenants paying a variable service charge:

6.4 **Landlord (through the management agreement between Dimensions and the Registered Provider)**

Rights:

- The right to collect service charges for all matters for which service charge is payable.
- The right to vary the service charge to ensure that costs are met by service charge payers in accordance with the lease or tenancy agreement.
- The right to apply to the First-tier Tribunal (Property Chamber) see [Glossary](#) to ask for an agreement to make a reasonable charge or to ask for dispensation.

Obligations:

- To ensure the reasonableness of service charges.
- To consult according to the process in the Landlord and Tenant Act 1985 (as amended by the Commonhold and Leasehold Reform Act 2002) (see **Variable Service Charge Accounting**).
- To provide reasonable budgets for service charge.
- To provide on request statements of accounts to all service charge payers within 6 months of the end of the accounting period or within one month of written request whichever is the later.
- To apply surplus or deficit in accordance with tenancy or lease.

6.5 Tenants

Rights:

- To be provided with on a written request a statement of accounts within 6 months of the end of the accounting period or within one month of request whichever request is the later.
- To inspect invoices on request.
- The right to apply to a First-tier Tribunal (Property Chamber) for a ruling on reasonableness of charge.
- The right to be consulted on any long-term agreements as per the Section 20 legislative threshold (see **Variable Service Charge Accounting**).

Obligations:

- To pay the service charge as demanded.
- To pay any deficit from previous year.

6.6 Management Agreements

Dimensions manages many properties on behalf of third-party landlords. Some of the management agreements specify variable service charges while others specify fixed charges. The current breakdown between the two is within **Variable Service Charges Only - Key Legislation** and this information will be kept up to date in Dimensions' data systems.

Calculation and accounting for service charges

- 7.1 All financial records, including spreadsheets, will be kept separate for the two service charge regimes.

Fixed service charges

- 7.2 Service charges will be set in accordance with the above principles in [section 5](#) and [section 6](#).
- 7.3 Charges will be reviewed annually with due reference to the tenancy agreement, management agreement, legislation and the cost of the services provided. Service charges are set by budget and can decrease or increase each year depending on expected expenditure in the next year and do not increase by a set percentage. Any surplus or deficit produced at the year-end will not be refunded or charged to the tenant.

- 7.4 We aim to minimise annual service charge fluctuations unless a significant change to a service contract is experienced. Where a service charge increase exceeds the percentage (%) increase to be applied to regulated rents, these will be reviewed by the Director of Housing before being approved and implemented.
- 7.5 Service charges will be calculated at a level sufficient to cover the estimated direct costs of the service provision and any associated indirect costs such as administration/management. Costs will be apportioned reasonably between properties receiving those services.
- 7.6 The methodology is set out below and this will be supplemented by operational procedures:
- Each property has its own code on the ledger to which all relevant income and expenditure is posted.
 - Service charges are calculated by first identifying the services provided at each property. For this, Dimensions uses a 'Service Map' which records all the services provided at the property, who provides the service, any contract details and how costs are to be shared between tenancies.
 - For each service provided, the Service Map will identify the apportionment methodology (how to share costs) to be used in allocating costs to individual tenancies within the property. The apportionment of services could be based on the square footage, an equal split basis, or a fair and reasonable split dependent on access/usage. Dimensions will apportion services based on a fair and reasonable apportionment of the costs between all tenants and as set out by the tenancy/lease. By fair and reasonable we mean that tenants are charged for services that are available to them.
 - The full cost of providing these services for the forthcoming year is estimated using the current year's costs adjusted for any one-off costs, uplifted for inflation and any known changes to the service provision.
 - Any sinking funds will be calculated in line with **Item not considered as services for tenants**.
 - A budget will be produced each year. Each budget will be reviewed by Regional Housing Advisors (RHA) and approved by the Housing & Contracts Manager (see [section 9](#)).
 - At the end of the year, the Finance Team will review income and expenditure on each property to understand whether any significant

surpluses or deficits have been produced. This is for learning purposes only and will be used to inform the setting of the following year's charge.

Variable service charges

- 7.7 Service charges will be set according to the principles in [section 5](#) and [section 6](#).
- 7.8 The calculation of variable service charges will consider the consultation requirements set out within **Variable Service Charge Accounting**.
- 7.9 Charges will be reviewed annually with due reference to the tenancy agreement, management agreement, legislation and the cost of the services provided. Dimensions will consider any reasonable requirements from Registered Providers for the calculation of service charges, including complying with their service charge policy. Service charges are set by budget and can decrease or increase each year depending on expected expenditure in the next year and do not increase by a set percentage. Any surplus or deficit produced at the year-end will be adjusted in the service charge for the year after next.
- 7.10 . Where a service charge increase exceeds the percentage (%) increase to be applied to regulated rents, these will be reviewed by the Director of Housing before being approved and implemented.
- 7.11 Service charges will be calculated at a level sufficient to cover the estimated direct costs of the service provision and any associated indirect costs such as administration/management. Costs will be apportioned reasonably between properties receiving those services.
- 7.12 The methodology is set out below and this will be supplemented by operational procedures:
- Each property has its own code on the ledger to which all relevant income and expenditure is posted.
 - Service charges are calculated by first identifying the services provided at each property. For this, Dimensions uses a 'Service Map' which records all the services provided at the property, who provides the service, any contract details and how costs are to be shared between tenancies.
 - For each service provided, the Service Map will identify the apportionment methodology to be used in allocating costs to individual tenancies within the property. The apportionment of services could be based on the square footage, an equal split basis, or a fair and reasonable

split dependent on access/usage. Dimensions will apportion services based on a fair and reasonable apportionment of the costs between all tenants and as set out by the tenancy/lease. By fair and reasonable we mean that tenants are charged for services that are available to them.

- The full cost of providing these services for the forthcoming year is estimated using the current year's costs adjusted for any one-off costs, uplifted for inflation and any known changes to the service provision.
- Any sinking funds will be calculated in line with **Item not considered as services for tenants**.
- A budget will be produced each year. Each budget will be reviewed by Regional Housing Advisors (RHA) and approved by the Housing & Contracts Manager (see [section 9](#)).
- After the year end a reconciliation process will be undertaken by the Finance Team. The service charge income is reconciled against the actual costs for that year and a surplus or deficit is produced.
- A service charge account will be issued to all variable service charge tenancies within 6 months of the year end. This will follow the requirements of **Variable Service Charge Accounting**.
- The following year's charge will be adjusted by any surplus or deficit or as per the tenancy agreement. This will follow the requirements of **Variable Service Charge Accounting**.

Eligibility of services for Housing Benefit and Universal Credit

- 8.1 Landlords in the social rented sector are also responsible for clearly setting out to the tenant which of their service charges are eligible for payment via benefits (such as Housing Benefit) and which are ineligible.

Provided that there is a contractual obligation for us to provide the services for which a tenant shall pay a service charge, most services are eligible for Housing Benefit and Universal Credit.

- 8.2 Eligible charges will include communal services which the tenants are unable to opt out of and are applied to all tenants at the property.
- 8.3 Ineligible services are non-communal personal services, such as personal heating, lighting and water to individual properties, or a service that the tenant can opt out of.

- 8.4 We will ensure that any ineligible charges are necessary, appropriate, and proportionate. Services ineligible for housing benefit and Universal Credit can be found at **Section 20 Consultation – variable service charges only**.
- 8.5 When estimates are sent to tenants for the forthcoming year's charges, we will show services as either 'Eligible' or 'Non-eligible'.

Housing Benefit (HB) or Universal Credit (UC) will not pay for 'Non-Eligible' charges. Only 'Eligible' charges will be considered for benefit purposes.

This will be undertaken to the best of Dimensions' ability, but the decisions on eligibility will be taken by the local authority Housing Benefit teams or Department for Work and Pensions (DWP) Universal Credit teams. Some cases may be open to differing interpretations of the Regulations, and UC Regulations on housing costs are not identical to HB Regulations.

It is important to remember that the tenancy is a contract between the tenant and the landlord, to pay the rent. Subsidising that rent is an arrangement between the tenant and the subsidising authority, and is not the direct responsibility of Dimensions, although Dimensions colleagues will assist where needed.

Notifications of proposed service charges for the following year

- 9.1 A breakdown of the proposed service charge is provided each year for items that are set out in the tenancy agreement. The breakdown details each service provided, the amount of the charge for each and whether eligible or ineligible for HB or UC.
- 9.2 For service charge purposes, the financial year runs from April to March of each year. All service charge changes will be approved by 15th of February each year. The Housing & Contracts Manager will ensure that tenants receive notification of the new charge no later than one calendar month prior to the new charge taking effect. The notification letter will meet statutory requirements regarding format and content.
- 9.3 Regional Housing Advisors will be responsible for reviewing service charges based on the budget set and what has been spent for the previous year, for all properties owned or leased by Dimensions where we are responsible for housing management. This will then be passed on to the Housing & Contracts Manager to ensure service charges are set at the correct level for the next financial rent year. The Housing & Contracts Manager will approve all final breakdowns.

- 9.4 Where service charges are delegated to another support provider via a Service Level Agreement, any changes will be requested by the end of January each year and approved by the Housing & Contracts Manager by the 15th of February.
- 9.5 We will send rent and service charges letters with breakdowns to tenants, appointees/deputies, and Housing Benefit directly, at least one month before the date of increase.
- 9.6 For the properties managed through management agreements, the landlord is responsible for notifying the tenant each year of the service charge for the forthcoming year. Dimensions will provide this information to the relevant Registered Provider in accordance with the timetable set out in the management agreement.

If we are managing properties on behalf of others, the name and address of the organisation who can collect the service charge must be included in any demand. The landlord will ensure that the required summary of rights and obligations is issued to the tenant (for variable service charges).

Consultation, engagement and complaints

- 10.1 We will consult tenants about proposed changes to existing services or proposed implementation of new services that are allowable under the terms of the tenancy agreement or lease. Consultation will be made in accordance with all relevant legislation and will be in a format suitable and accessible for tenants.
- 10.2 For variable service charges only, we will consider the management agreement responsibilities for consultation and, should this be Dimensions responsibility, we will consult in line with [Section 20 consultation requirements of the Landlord and Tenant Act 1985](#), (see **Variable Service Charge Accounting**) if the levels are triggered for long term agreements. We will consider the tenant's views as well as cost, service provision and value for money when making a decision.
- 10.3 Services are only added if:
- the lease/tenancy agreement allows for the cost to be recovered
 - the service is connected with the provision of accommodation
 - the cost of providing the service is reasonable and affordable
 - it is customary to provide similar services for residential accommodation

- the service can be reasonably provided
- Dimensions will not be financially disadvantaged by the provision of the service
- tenant consultation is performed, and views are considered.

10.4 When considering providing a new or enhanced service, we will consider if the charges will be eligible for payment under Housing Benefit or Universal Credit criteria to ensure they remain affordable.

Once a new service has been agreed to be provided a new service consultation letter must be sent to each tenant paying for the new service charge which gives details of the new service to be provided and future cost.

10.5 **Satisfaction with services and service charges**

We will carry out customer satisfaction surveys at regular intervals and will use feedback to influence the future provision of services.

10.6 **Complaints**

Complaints regarding service charges will be dealt with in line with our **Concerns, complaints and compliments policy**.

Complaints that require legal remedies (challenge of apportionments or services provided that cannot be resolved between the tenant and Dimensions) may need to be pursued outside of the complaints procedure.

We will use all complaints as opportunities for learning and improving our services.

10.7 For variable service charges, the First-tier Tribunal (Property Chamber) may be used for matters relating to the requirements to pay or the reasonability of the service charge.

10.8 Any request for a refund due to the failure of a service will be dealt with through our **Concerns, complaints and compliments policy**, and **Compensation policy**.

Value for money

11.1 **External contractors**

The contract register lists all suppliers and contracts in place for all services. As part of the procurement process, Dimensions will ensure that contracts are

procured with value for money at the forefront. A review of contracts will take place in line with the procurement procedure. See the **Procurement policy**.

11.2 Service charges on new developments

As part of any new development, new budgets will be drafted at appraisal stage and the following factors taken into consideration:

- service charges compare to those for similar properties
- whether the services provided are necessary for the enjoyment of the home
- whether costs may be avoided through modified design
- affordability of services provided
- we will consider future repairs and replacements
- costs are apportioned fairly across the relevant properties
- eligibility of services provided for housing benefit/universal credit
- administration fees for tenants will be applied at 15% for services
- affordable rent and high service cost implications on rental income.

11.3 Housing and Finance Teams are informed of all new developments by the Property Team before financial appraisal stage to ensure reasonableness of the service charge is considered. Budget assumptions will be reviewed again before the tenancy signup to ensure that services costs are accurate and reflect the final services being provided.

Relevant legislation, guidance and related policies and templates

This policy and related procedures consider the following legal requirements and regulatory codes, standards, and guidance:

Legislation

- 12.1 Data Protection Act 2018
- 12.2 General Data Protection Regulations (UK-GDPR)
- 12.3 Equality Act 2010
- 12.4 Housing Acts (1985, 1988, 1996, and 2004) as amended

- 12.5 Landlord and Tenant Act (1985, 1987 – as amended)
- 12.6 Commonhold and Leasehold Reform Act 2002
- 12.7 Housing Benefit (general regulations) 1987 (as amended)
- 12.8 The Service Charges (Consultation Regulations) (England) 2003 (the ‘Consultation Regulations’)

Guidance

- 13.1 Regulator of Social Housing Regulatory Standards for Landlords
- 13.2 National Housing Federation Service Charges Guidance
- 13.3 Royal Institution of Chartered Surveyors (RICS) guidance
- 13.2 Value for Money Principles

Group policies

- 14.1 Rent
- 14.2 Procurement
- 14.3 Building maintenance
- 14.4 Concerns, complaints and compliments
- 14.5 Compensation
- 14.6 Financial regulations and delegations
- 14.7 Data handling and protection
- 14.8 Equality, diversity and inclusion

Related procedures, decision flowcharts, forms

- 15.1 Operational procedures for service charge setting
- 15.2 Relevant Legal, Regulatory and Best Practice Information for Service Charges
- 15.3 Variable Service Charges Only - Key Legislation
- 15.4 Items that could be included in a service charge
- 15.5 Sinking Funds
- 15.6 Item not considered as services for tenants
- 15.7 HB Ineligible Services
- 15.8 Section 20 Consultation – variable service charges only
- 15.9 Variable Service Charge Accounting

Equality statement

- 16.1 Dimensions is committed to adhering to the Equality Act 2010 and the Public Sector Equality Duty. We aim to achieve this by promoting equality, respecting diversity and ensuring inclusion, eliminating unlawful discrimination for our colleagues and the people we support. Please see our **Equality, diversity and inclusion policy**.
- 16.2 We adhere to the Equality Act 2010 by promoting equality, diversity, and human rights by treating all people we support and employ fairly and equitably whatever their protected characteristic:
- age
 - disability
 - gender reassignment
 - marriage and civil partnership
 - pregnancy and maternity
 - race
 - religion or belief
 - sex
 - sexual orientation
- 16.3 At Dimensions we will not tolerate any forms of abuse or discriminatory behaviour towards our colleagues, people we support, family members or people we work with. We will always act and will not be by-standers.
- 16.4 The equality impact analysis (EIA) is available on request by emailing the Head of Equality, Diversity and Inclusion.

Data protection statement

- 17.1 This policy involves handling personal data. So, when you carry out any procedures this policy describes, you should also think about what our **Data handling and protection policy** says.
- 17.2 Our **Data handling and protection policy** is our promise to handle personal data correctly under the Data Protection Act 2018 and the General Data Protection Regulation (UK-GDPR). It tells you how to keep that promise. It balances everyone's rights to data privacy with the work we do.

17.3 For information on how we handle personal and sensitive data, please see our privacy notices.

Review

18.1 We will review this policy three years from its original publication. But if changes in legislation, regulation or best practice mean we need to, we will review sooner.

18.2 If the changes are big, we will equality impact analyse (EIA) the policy again and send out to consultation in line with our **Policy development and consultation policy**.

18.3 For smaller changes, we will update this same version. We will record this in the Version control section below.

Glossary

19.1 An explanation of words and terms that appear in this policy or the related procedures.

Term	Definition
Affordable Rent	Affordable Rent is a type of social housing rent where eligible Tenants pay up to 80% of market rent, including service charges. Market rent is determined by a valuation and based on a comparable property in a comparable area, receiving a comparable supported housing service
Component	Any major manufactured subsystem or subassembly, designed for use as an integral part of a home, for example, a kitchen, bathroom, heating system
CPI	Consumers Prices Index is a measurement of inflation (change in prices for goods and services over time)
Deficit	A financial amount by which expenditure exceeds income
First-tier Tribunal (Property Chamber)	A legal body with the power to make decisions on property matters, including service charges

Term	Definition
Housing management services	An umbrella term primarily defined as the provision, management and maintenance of social housing
Lease	A legal contract by which one party conveys land or property to another
Management agreement	A legal agreement between a landlord and a managing agent, for the provision of Housing management services
Market valuation	The value of a property or asset based on the price that would be paid for it if it were sold at a certain time
Registered provider	A social housing provider registered with the Regulator of Social Housing
Service map	Records all the services provided at the property, who provides the service, any contract details and how costs are to be shared between people
Sinking fund	A separate fund built up over time to pay for expensive items, such as major repairs or replacements
Surplus	A financial amount by which income exceeds expenditure

People and groups involved in writing and approving this policy

Policy owner:	Director of Housing
Policy Responsible Executive Lead:	Julia Ashley, Chief Housing and Communications Officer
Approval level:	Dimensions Board via Finance and Resources Committee (FRC)
People and groups consulted:	Housing Department Finance Department Diversity Matters National Colleague Forum Policy Subgroup

Version control

Version number	Approved date:	Communication date:	Summary of changes
I	29 th January 2025 (FRC) 27 th March 2025 (Board)	1 st April 2025	New policy.

Next review due: March 2028