ESTATE MANAGEMENT POLICY & PROCEDURES

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Owner - role	Director of Property Services

Record of Updates/Changes			
Current Version	**Date Approved**	**Approved By**	**Changes**
V1	December 2023	Management Committee	
V2	To Sept MC		Minor only & owner role change from Director of Housing Services

1. INTRODUCTION

Estate Management activities are vital to effectively manage the environment around Castlehill Housing Association (CHA) properties and any common areas to ensure that the neighbourhood is an attractive, safe and secure place to live. CHA is committed to providing good quality estate management services to the highest possible standard whilst keeping service charges and factoring charges affordable for tenants and owners.

Estate Management broadly covers the external landscaping at our housing developments, the internal common area cleaning, common area window cleaning, the parking areas and the security of our schemes.

CHA operates over a wide geographical area. This in addition to customer demand influences our estate management response. CHA provides estate management services on behalf of Castlehill Housing Trust, Castlehill Solutions and Factoring services to Sharing Owners and 100% Owners, in addition to Castlehill Housing Association social housing schemes. All services are carried out in line with our Equality and Diversity policy.

2. SCOPE

This policy aims to set out how CHA will manage estates in a proactive, consistent, and appropriate way. The policy aims to reflect good practice and deal with estate management issues in a proactive and equitable way.

CHA procures grounds maintenance, communal repairs, cleaning, and window cleaning services through Procurement Contracts Scotland (PCS) to ensure transparency and value for money is provided. CHA also manages and inspects the works to help provide an effective contract management system.

Estate management services are paid for by tenant service charges and factoring charges and our aim is to provide value for money services with good levels of customer satisfaction.

3. RELATED POLICIES

The Estate Management Policy aims to complement other policies and procedures including:

- Customer Service Strategy and Standards
- Debt Management Policy
- Anti-Social Behaviour and Harassment Policy
- Reactive and Planned Maintenance Policies
- Relevant Health & Safety Policies

- Void Management Policy
- Complaints Policy
- Tenant Participation Policy
- Recharge Policy

These complementary policies are documented separately.

4. LEGAL FRAMEWORK

Our Estate Management Policy aims to achieve a high level of performance and quality in Estate Management in line with the Outcomes and Standards detailed in the Scottish Social Housing Charter.

The primary charter outcome is Outcome 6: Estate Management, Anti-Social Behaviour, and tenancy disputes which states that:

Social landlords, working in partnership with other agencies, help to ensure as far as reasonably possible that:

- tenants and other customers live in well maintained neighbourhoods where they feel safe.

The relevant outcomes from the Charter are:

Outcome 2: Communication
Outcome 3: Participation
Outcome 13: Value for Money

5. ROLES AND RESPONSIBILITIES

5.1 Role of the Management Committee

The Management Committee has responsibility for monitoring the performance of our estate management services against the targets published in the internal management plan. The Committee also has responsibility for reviewing the policy.

The Committee meets quarterly to review performance reports.

5.2 Role of the Housing Services Manager

The Housing Services Manager takes a strategic overview of the performance as well as delivering operational management of the estate management service provided by the Housing Services Team. They also procure the contracts for the communal cleaning service.

The Housing Services Manager is responsible for setting service charges on a full cost recovery basis.

5.3 Role of the Property Services Manager

The Property Services Manager strategically overviews the performance of their team and ensures that staff follow the policy requirements. They also procure contracts for grounds maintenance, communal repairs, and all compliance requirements. Ensure Health and Safety policy and procedures are followed. Monitor Property Services team and contractor performance and approve invoice completion over SPSO approval limits.

5.4 Role of the Senior Housing Services Officer

The Senior Housing Services Officer is responsible for ensuring that estate management is dealt with appropriately and proactively and that action has been undertaken in line with published policy and procedures. The Senior Housing Services Officer undertakes the customer satisfaction surveys for the cleaning and window cleaning contracts. Where appropriate the Senior Housing Services Officer will attend estate inspections to support staff and liaise with tenants and customers.

5.5 Role of the Senior Property Services Officer

The Senior Property Services Officer ensures that the Property Services Officers carry out reactive inspections as required and provide a cost-efficient service to a high standard. They also ensure all statutory compliance checks and inspections are carried out. Hold regular KPI contractor meetings to ensure standards of work and completion times are being met and value for money is being obtained. Ensure that Property Services Officers are carrying out scheme inspections 2 times a year at regular intervals.

5.6 Role of the Housing Officer

The Housing Officer will be responsible for the delivery of estate management services by regularly inspecting schemes and reporting any issues for repair or with specialist on site contractors e.g. the cleaning contractor. The Housing Officers attend 2 inspections at each scheme ever year with the Property Services Officer and with tenants.

5.7 Role of the Property Services Officer

When on site to ensure day to day reactive repairs are carried out to a high standard and ensure value for money is achieved. To also carry out 2 inspections at each scheme every year with the Housing Officers and tenants to check that the communal areas are kept in a safe well-maintained condition.

6 POLICY REQUIREMENTS

6.1 Proactive Approach

- To ensure that both the Association and tenants meet relevant obligations in relation to estate management issues contained in the Scottish Secure Tenancy Agreement.
- To ensure that housing stock and common areas are regularly inspected by staff and, that visits are documented, and any arising issues are dealt with effectively.
- To minimise vandalism and damage.
- To ensure Housing Management and Property Services staff maintain a “high profile” and that mutually beneficial good landlord/tenant relationships develop.
- To ensure the upkeep of the housing stock and surrounding environment is managed to a standard which contributes to reduction in void property times. Dealing promptly with minor issues e.g. litter, so that they do not escalate.

6.2 Customer Satisfaction

- To provide a service which has a positive impact on tenant satisfaction with their environment and local community.
- To encourage tenant involvement in maintaining the common areas of their homes to a good standard.
- Maintaining a high level of customer satisfaction is the overall objective of Estate Management Policy.
- CHA will ensure effective communication in different formats around Estate Management priorities.
- To provide parking guidelines for tenants and customers who rent homes with communal car parks based on communities self-managing spaces which are not formally regulated by CHA staff. Providing guidance to tenants and customers to utilise spaces with due regard for their neighbours.
- CHA will ensure estate management services provide value for money for tenants and customers.

6.3 Health and Safety

- To maintain high standards in common areas such as stairs, entrances, bin stores, drying areas, gardens and car parks and ensure that Health and Safety obligations are met.
- To ensure that repairs to common areas reported are prioritised correctly and carried out within target and to a high standard.
- To ensure effective liaison with appropriate agencies such as Local Authority Departments, Community Wardens or Police in relation to environment issues such as street lighting, refuse collection, vandalism or abandoned vehicles.
- Ensure that fire safety equipment is maintained in good working order and services regularly.

- When staff are on site and see any obstruction or items stored in communal stair areas or outside, they must take action to get any items removed that could cause a risk to anyone living in or visiting the building.
- Signage is displayed in communal areas where it is felt necessary to make residents and visitors aware of the risks of items in communal areas which could be a fire risk or cause an obstruction.
- We will comply with the tolerable standards for pathways in line with our public liability insurance.
- Risk will be managed by risk assessing the impact of the risk and by reducing the likelihood of the risk were possible.

7 REPORTING

Reports on any relevant Estate Management issues will be included in each Housing Services Report to the quarterly Management Committee. Large scale Tenants Satisfaction Surveys or smaller scheme specific surveys will assess satisfaction ratings by asking the relevant satisfaction question and this will be reported through the submission of the Annual Return on Charter to the Scottish Housing Regulator.

The Housing Services Manager & the Property Services Manager will monitor implementation of policy and procedures on an ongoing basis and ensure performance information is correctly documented.

Targets for Frequency of Inspections are as follows:

General Inspection of All Common Areas	- Minimum 2x per annum
Communal Cleaning	- Monthly
Garden Areas	- Minimum 2x per annum
Housing for Older People	- Minimum 2x per annum

Feedback to Tenants

Once an inspection has taken place the Housing Officer will write to all tenants, within 10 working days of the visit taking place, using the Feedback letter Template. This letter will detail what issues were identified during the scheme inspection, time frame for the issue to be resolved and which member of staff is responsible for ensuring it is resolved in a timely manner.

8 TRAINING

Staff training will take place where there is a requirement needed, this will be identified at the time of staff recruitment, 1 to 1 meetings, and at annual reviews.

9 REVIEW OF POLICY

The Director of Property Assets Services is responsible for ensuring that the policy is reviewed every 3 years or earlier if legal, performance or other changes necessitate this. The policy will be reviewed jointly by the Housing Services Manager and the Property Services Manager.