

Estate Management Policy

We are currently reviewing this policy and consulting with customers to make sure it reflects current practice and meets customer needs. We expect to publish an updated version by *November 2026*. In the meantime, this version remains the policy currently in force.

Date written: June 2014

Date(s) reviewed: October 2017; October 2020; October 2023

Purpose: To set out Bernicia's approach to estate management with regard to the inspection and compliance of its communal areas and the general areas within estates which area in the ownership of Bernicia (excluding Kingston) with the aim of ensuring the environment around our properties provides attractive, well maintained, safe and secure places in which to live.

Scope: The management of the environment around our properties that is owned by Bernicia.

Date for review: October 2026

Responsibility: Director, Housing Services

1. Introduction

- 1.1 This policy outlines how we aim to provide good quality, value for money estate services that ensure the environment under our control provides attractive, well maintained, safe and secure places in which to live.
- 1.2 In doing so we will comply with all relevant legislation, regulatory codes, and guidance.
- 1.3 Bernicia will aim to meet the requirements of the Regulator of Social Housing national standards and local standards/offers developed and agreed with tenants.
- 1.4 Bernicia provides rented accommodation throughout the north east of England on estates with a variety of properties comprising of flats, houses, and sheltered accommodation and supported housing schemes. These estates vary in size makeup.
- 1.5 The communal areas will include both internal and external communal areas considering paths, roads, parking areas and landscaped areas belonging to Bernicia.
- 1.6 External general areas will be limited to those areas which are owned by Bernicia and where Bernicia has the legal duty to maintain these areas.
- 1.7 The policy itemises services into relevant headings and highlights expectations of each.
- 1.8 Recorded monitoring will take place to ensure that all relevant areas are inspected in line with the programme.

2. Policy statements

- 2.1 The specific issues and services covered are:

- External Communal and General Areas
- Internal Site Inspections of Communal Parts
- Landscaping
- Tree Inspections
- Communal Cleaning
- Communal Window Cleaning
- Playground Equipment
- Gritting & Snow Clearing
- Passenger Lifts
- Automatic Doors
- Emergency Lights
- Fire Alarms
- Water Hygiene
- Laundry Equipment
- Man Safe Systems

- Asbestos
- Garden Clearance & Maintenance (empty properties)
- Dog Nuisance
- Livestock
- Estate Inspections

- 2.2 Some services contained within this policy may be provided by an external partner via a service level or partnership agreement or contract.
- 2.3 We will maintain close links with local authorities and/or other service providers to resolve issues that fall outside our responsibility or control.
- 2.4 Bernicia will identify any new schemes that have come into management to ensure all required estate services including inspections are being carried out.
- 2.5 In Bernicia Living schemes, inspections will be undertaken by Bernicia Living Housing Officers or Location Co-ordinators using bespoke inspection forms (Appendix C & D).

2.6 External Communal and General Areas

- 2.6.1 We will carry out regular site inspections of all external communal and general areas owned by Bernicia to ensure all areas are safe and of an acceptable standard. These inspections will be to an undertaking as per an agreed risk-based programme.
- 2.6.2 An External Site Inspection Form (Appendix A) will be completed for each visit with the completed form being recorded in the electronic scheme file.
- 2.6.3 The site inspection will cover all relevant areas ensuring they are in an acceptable condition and free from trip hazards. These will include:
- Footpaths, Roads, and Courtyards
 - Garages and Parking Areas
 - External Lighting
 - Drains and Gullies
 - Landscaped areas
 - Trees
 - Boundary Fencing and Walls
 - Graffiti
 - Dog Fouling
 - Fly Tipping
 - Abandoned or Illegal Parked Vehicles
 - Sharps

2.6.4 If any issues are identified whilst on site, these will be dealt with as follows:

- Any repairs that are required should be either logged when on site either using a handheld device or by phoning through to the Customer Contact Team. The location of the repairs should be carefully identified along with photographs to record the location and condition. The repair should be logged on the site inspection form along with the relevant repair number identifying the priority in line with Bernicia's repair policy.
- If any Health and Safety issue are identified, including tripping hazards, these will be reported as a priority repair and a photograph taken.
- Any fly tipping should be removed when on site where possible. If this is not possible due to the size of items or the quantity of items, the Estate Operative will report this and arrange for the work to take place the following working day with the assistance of a colleague.
- We will also report any fly tipping or dumping to other landowners as appropriate.
- We will work closely with local authorities to deal with any problems arising from refuse collection, street cleaning and litter picking in order to keep estates tidy.
- We will work with our tenants to ensure that refuse is disposed of safely, tidily and in the correct containers.
- We will work with partners on campaigns to deter fly tipping, encourage responsible waste recycling and enforcement action as required.
- Any abandoned or illegally parked vehicles and dog fouling will be actioned by the Housing Officer. Photographs should be taken of the vehicles including the registration.
- We will regularly monitor the condition of our garage sites to ensure that these are adequately maintained and being utilised by customers in accordance with tenancy conditions.
- Vehicles using resident parking areas must be road legal and Statutory Off Road Notices (SORN) will not be accepted as an alternative to vehicle taxation.
- Caravans, trailers, or boats must not be parked in parking areas, and we will take steps to enforce their removal.
- We will act swiftly to address any unauthorised and inconsiderate parking in areas set aside for vehicles which are owned or managed by Bernicia.
- Any offensive graffiti will be removed within 1 working day and all other graffiti within 5 working days
- We will fully investigate all acts of vandalism and graffiti to property and common areas. Appropriate enforcement action will be taken against all known perpetrators of vandalism to property and where possible we will recover the costs of any works necessary to make good the damage.
- We will take a positive approach to working with other agencies to discourage acts of vandalism.
- Any issues associated with the standard of landscaping and trees will be reported to the Estate Services Team Leader. This should include details of the issues and the location along with photographs of the identified problem.
- Any sharps that are found will be removed by the Estates Operative or reported to the Estate Services Team Leader who will arrange for an external contractor to attend and remove the item

- Monitoring of the external site inspection programme will be carried out by the Estate Services Team Leader to ensure that all sites are inspected in line with the programme.

2.7 Internal Site Inspections of Communal Parts

2.7.1 The designated Housing Officer will carry out site inspections of all internal communal areas to ensure they are safe and in an acceptable condition. This will include enclosed fenced communal garden areas around a scheme/building where this area is owned solely by Bernicia or where Bernicia has the responsibility for maintaining this area. These inspections will be undertaken as per an agreed risk-based programme.

2.7.2 An Internal Site Inspection Form (Appendix B) will be completed for each visit with the completed form being recorded in the electronic scheme file.

2.7.3 The site inspection should cover all relevant areas ensuring they are in an acceptable condition and free from trip or fire hazards. These will include:

- Cleaning
- Condition of stairs/passageways (including identifying any trip/fall hazards)
- Items left by tenants within circulation areas and in particular ingress/egress routes (including immediate removal once discovered)
- Decoration
- Flooring
- Lifts
- Entry doors
- Bin areas
- Notice boards
- Laundry areas
- Fire panel faults (where a fire panel is within the building)
- Any door closers which are not functioning and closing doors flush with door frames

2.7.4 If any issues are identified whilst on site, these will be dealt with as follows:

- An inspection will take into account the internal cleaning of passageway which includes all stairs, passages, halls, and windows. If it is found that any of these are of an unacceptable standard they should be reported to the Estate Services Team Leader with photos where appropriate.
- Stairs/passageways will be inspected to ensure they are free from obstacles and tripping hazards. All fire escape routes should be clear of any hazards, including the tenants personal possessions, and be identified with correct signage. Residents should not store items within communal areas at any time. If any items are found the Housing Officer will arrange immediate removal and discuss the issue with the relevant resident. The Housing Officer is also responsible for ensuring signage is replaced if missing.

- Decoration will be of an acceptable condition and free from graffiti. If graffiti is found this should be reported to the Estate Services Team Leader who will arrange for its removal. If decoration is unacceptable it should be reported to Asset Investment Programme Manager for consideration in the decoration programme.
- Carpets will be checked to ensure they are secure and that joints are not coming apart. Stair treads should be in place and secure. If any issues are found they will be reported as a repair and logged as an emergency due to a health and safety issue, with their location recorded along with appropriate photographs. All floor coverings should be fire retardant.
- Lifts will be inspected to ensure they are clean, working correctly with no faults indicated. The lift should be in full working order. Any issues will be reported to the Customer Contact Team who will arrange to report it to the relevant contractor.
- All entry doors (including those that are not automatic) will be checked to ensure they are operating correctly, safe, and secure. If any problem is found a repair will be reported as a priority due to Health and Safety and security issues.
- Automatic doors will be visually inspected monthly to ensure there are working correctly and showing no sign of damage.
- Fire doors will be inspected to ensure they are not wedged open and that they fit into the reveal and overhead door closers are working correctly.
- Bin areas will be inspected to ensure that they are only being used for household rubbish and that items are being placed into the refuse bins provided. No items should be located within bin stores either stored or fly tipped. If any fly tipping is found the Housing Officer should report this to the Estate Service Team Leader who will arrange for it to be removed to alleviate any possible fire hazard. If bin stores are found to be used for storage the relevant tenant should be contacted and requested to remove items with the Housing Officer arranging disposal after a specified period.
- An inspection of the notice board will be undertaken to ensure that no offensive material has been posted on it and that no forms have been defaced. Any offensive or defaced material will be removed and disposed of. All material displayed on the notice board should be relevant and current.
- Laundry areas will be checked to ensure that they are clean and free from hazardous material. Residents should not leave clothing in the drying area in case of fire. If clothing is left the Housing Officer will remove it and contact the residents. All machines will be checked on a yearly basis by an external contractor and serviced.
- Any sharps that are found will be reported to the Estate Services Team Leader who will arrange for an Estate Operative or external contractor to attend and remove the items.
- Monitoring of the internal site inspections will be carried out by the relevant Housing Manager to ensure that all sites are visited in line with the programme.

2.8 Landscaping

- Bernicia will arrange landscape services for all communal and general areas which it owns by both contractor and its own internal teams. Work will be carried out for the duration of the growing season.
- Shrub pruning and replacement works will take place twice a year at the beginning and end of the growing season.
- Shrubs shall be maintained during the growing season to keep shape and avoid encroachment onto footpaths.
- Landscaping sites will be inspected by the Estate Operatives during their site inspections and any issues reported to the Estates Services Team Leader.
- Random spot checks of sites will take place to inspect the standard of work and any issues will be reported to the Estates Services Team Leader.

2.9 Tree Inspections

- Bernicia will arrange an inspection of trees that are in gardens, communal or general areas by an external contractor who is an approved ARB member.
- Trees will be inspected every three years unless stated otherwise.
- Any works which are identified as high priority within the inspection should be carried out. Other trees will be monitored in line with the tree inspection report.
- The tree inspection reports will be held electronically for a period of 5 years.

2.10 Communal Cleaning

- Bernicia will arrange cleaning of its communal areas both by contractor and its own internal staff.
- Specification and frequency will be produced for each scheme depending on the requirements of the site taking into account the clientele group.
- Housing Officers and Bernicia Living Location Co-ordinators will inspect the internal communal areas assessing the standard of cleaning. Any issues will be passed to the Estate Services Team Leader to address with the contractor.
- The Estate Services Contract Assistant will carry out monthly on-site audit checks with the representative of the cleaning company to monitor the standard of the cleaning.
- Any issues identified will be recorded and addressed with the site being re-inspected to ensure all issues are rectified.

2.11 Communal Window Cleaning

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- Bernicia will appoint an external contractor to carry out its communal window cleaning.
- The contractor will clean both internal and external communal windows on a monthly basis
The contractor will forward to Bernicia on a monthly basis completed satisfaction forms from tenants for each site which will be recorded electronically.
- The relevant Housing Officer will inspect the standard of communal window cleaning as part of their site inspections and report any issues to the Estate Services Team Leader.

2.12 Playground Equipment

- Bernicia will arrange for all playground equipment to be inspected on a weekly basis by a trained assessor in line with RoSPA requirements. All inspection forms will be held electronically. Any repair issues identified should be reported to the Customer Contact Team with the play equipment taken out of use till repaired.
- Bernicia will arrange for its insurance company to inspect all playground equipment on a yearly basis providing reports of its findings. All reports will be held electronically.

2.13 Gritting and Snow Clearing

- Bernicia will arrange the gritting and snow clearance from the footpaths of its sheltered housing schemes to increase the safety of its residents and visitors when coming and going from the scheme based on the weather forecast for the particular day.
- Staff will endeavour to carry out gritting and/or snow clearing at the beginning of the working day.

2.14 Passenger Lifts

- Bernicia will ensure that all passenger lifts are safe and are serviced on a regular basis.
- Bernicia will arrange for all passenger lifts to be serviced monthly by an external company affiliated to the LEIA and a LOLER inspection carried out every 6 months by an external auditor. (Please see Lifts Management Plan and Operational Guidance Manual for specification).

2.15 Automatic Doors

- Automatic entry doors will be serviced twice a year by an external company who is affiliated to ADSA to ensure there are safe for use to avoid trappings.
- The details of the inspection will be logged in the service book which is located on site (see Electrical Management Plan and Operational Guidance Manual for specification).

2.16 Emergency Lights

- Bernicia's Estate Operatives will on a monthly basis check all emergency lights. They will log all test within the fire log book that is held on site. Any repairs that are required will be reported through to the Customer Contact Team or reported using a handheld device.
- On a yearly basis Bernicia will arrange for an external contractor to carry out a full service of the emergency light system with details being logged into the fire log book and certification send to Contract Services (see Electrical Management Plan and Operational Guidance Manual for specification). Any repairs required will be reported to the Customer Contact Team and an order number provided for them to carry out the necessary work.
- Contract Services will review the certification to identify if repairs are required. If repairs have been required they will check to ensure they have been reported and carried out.
- All relevant documents will be recorded and stored electronically.

2.17 Fire Alarms

- Bernicia Estate Operatives and Bernicia Living Location Co-ordinators will test fire alarms on a weekly basis, including checking for any faults on any fire panel. Test points will be rotated in order that every test point is tested over a period of time. All details will be logged into the fire log book including the location of the point that has been tested. Any repairs that are required will be reported through to the Customer Contact Team or reported using a handheld device.
- Bernicia will arrange for the fire alarm to be serviced and tested by an external contractor on a quarterly bases with all testing being logged into the fire safety log book and certification being sent to Contract Services (see Electrical Management Plan and Operational Guidance Manual for specification). Any repairs required will be reported to the Customer Contact Team and an order number provided for them to carry out the necessary work.
- Contract Services will review the certification to identify if repairs are required. If repairs have been required they will check to ensure they have been reported and carried out.
- All relevant documents will be recorded and stored electronically.

2.18 Water Hygiene

- Where a risk has been identified, Bernicia will arrange for monthly testing to take place by an external contractor (see Water Safety Management Plan and policy).
- All infrequently used outlets will be run weekly to remove any risk.

2.19 Laundry Equipment

- Bernicia will arrange for all outlets to be checked and cleared by the Estate Operatives monthly.

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- Tumble dryer vents in Bernicia Living Schemes will be checked weekly by the Location Co-ordinators.
- All equipment will be inspected on a yearly basis by an external contractor with all documents being passed to Contract Services.

2.20 Man Safe Systems

- Bernicia will ensure that all man safe systems are inspected on yearly basis by a qualified contractor.
- All access ladders and edge protection will be inspected yearly by a qualified contractor.
No contractor will be allowed on roofs above 3 storeys or offices without the correct training and their own safety harness
- All works carried out on multi storey tower blocks roof areas will be subject to roof permit being issued. Access will be monitored and granted by the Cyclical Contracts Manager.

2.21 Asbestos

- Bernicia holds a log of asbestos that is located within its communal areas.
- All asbestos within communal areas will be re-inspected yearly to monitor the condition of the asbestos, confirm no actions are required and to ensure that the log is correct.
- All repair orders will inform contractors of the presence of asbestos, with this information also available on the repair portal.
- Signage will be located within the affected communal areas informing contractors that no work should take place without contacting Bernicia.

2.22 Garden Clearance & Maintenance (empty properties)

- When a property is vacated we will remove any items left by the outgoing tenant and trim vegetation etc to a reasonable level. The inspection and maintenance of gardens will continue on a two-week cycle until such times as the property is re-let or disposed of. The Estates Operatives will carry out the inspection and maintenance of gardens when a property is identified as a long-term void.

2.23 Dog Nuisance

- We will take appropriate action where residents fail to properly control their dogs in our communal areas or open spaces and will work with the local authority to deal with stray and dangerous dogs.
- Any dog owners who allow their dogs to foul public areas will be reported to the local authority dog warden service for investigation and action which may include tenancy enforcement if appropriate.
- Action will be taken if excessive dog barking causes nuisance or annoyance to neighbours.

2.24 Livestock

- We will not allow any livestock (such as horses, cattle, goats, pigs, sheep, geese, ducks etc) to be kept on any communal land under our control and where this is not adhered will take appropriate action to ensure their removal.

2.25 Estate Inspections

- We will carry out a regular programme of inspections to ensure our estates are maintained to required standards.
- The frequency of inspection will reflect the depth and level of inspection required and will vary depending on the size, design and grading of an estate and action which may include tenancy enforcement if appropriate.
- We will also monitor the condition of individual properties and gardens in order to identify any breach of tenancy conditions.
- Any breach of tenancy conditions identified will be dealt with in accordance with the Tenancy Agreement and any repairs in accordance with the Repairs and Maintenance Policy.
- We will formally record any issues reported from estate inspections and will identify any 'hot spot' areas that require more frequent attention.
- We will annually grade our estates using a risk matrix, this will include information from our Asset Management Matrix, customer feedback and complaints, officer intelligence and the standardised satisfaction survey undertaken every 3 years. Any areas which receive a high score will be programmed for more regular inspections.
- We will work proactively with residents and partners to identify specific projects or grant funding that could benefit and improve environmental conditions on estates.

3. Responsibility of Implementation

3.1 It is the responsibility of the Head of Service (Tenancy & Neighbourhoods), the Head of Service (Bernicia Living) and the Head of Service (Care & Support) to ensure that this policy is carried out fairly and effectively with the support of Location Coordinators and Housing Officers. It is the responsibility of the Head of Service (Tenancy & Neighbourhoods), the Head of Service (Bernicia Living) and the Head of Service (Care & Support) to ensure this policy is carried out effectively with the support of the Housing Services Managers, Team Leaders, Housing Officers Location Coordinators and Estate Operatives.

4. Actioning the Policy

4.1 We will ensure that services are planned, effectively resourced, and comply with our legal requirements as a landlord.

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- 4.2 We have detailed procedures and service standards that support the practical implementation of this policy.
- 4.3 Any services tendered will be in accordance with Bernicia's standing orders and financial regulations. Where a service charge is levied to recover the cost of the service, this will include a management and administration element.
- 4.4 We reserve the right to add, modify or alter the services provided, subject to consultation with tenants/residents, in the interests of good estate management and/or to demonstrate value for money.

5. Monitoring the policy

- 5.1 Housing Services will evaluate and track the impact of our approaches set out in this policy by:

- Recording, monitoring, and reporting on compliance with service standard targets.
- Recording, analysing, and learning from complaints, queries and disputes relating to estate management.
- Contributing to the management of external contractors.
- Benchmarking to allow comparisons on performance and cost of delivering estate services.
- Recording tenant satisfaction with the condition of estates and communal areas as part of satisfaction surveys.

6. Resources

6.1 There are no resource implications as a consequence of this policy as all actions will be delivered by existing resources.

7. Equality and Diversity

7.1 An equality and diversity impact assessment has been undertaken on this policy. In carrying out our services, we are committed to:

- Treating all customers and employees positively regardless of any personal characteristics including gender, age, ethnicity, disability, sexuality, gender reassignment or religion.
- Taking seriously all complaints and investigating and responding accordingly.
- Using plain language and providing information in other languages, large print, audio, and Braille on request.

Uncontrolled if printed – This may not be the latest version of the policy

All policies must be printed from Connect only – please make sure it is the latest version.