Residential development at Sunnydale Close, Surfleet, Lincolnshire
Public Open Space Maintenance Plan and Estate Management Overview

1.0 Location & Overview

The scheme comprises a residential development of 75 freehold properties situated at Sunnydale Close, Surfleet, 6 housing association are excluded from the management company and any charges until such time as they may become private dwellings (Service Charge Plots). The development will incorporate the management of the public open space (POS) and drainage easement as outline on Management Company Conveyance plan's drawing 118–MCCP – 01, dated 07-08-2020.

2.0 Introduction

Encore Estate Management are a firm of residential estate managers established in 2003 based in Cambridge with recognised regional offices in Nottingham, Sandhurst and London. Encore work with a wide range of national and regional homebuilders and has a wealth of experience in managing residential property.

Encore is a corporate member of the Association of Residential Managing Agents (ARMA) and is a registered member of The Property Ombudsman (Number: D6771). We manage our portfolio in line with the requirements of the Royal Institution of Chartered Surveyors (RICS) Residential Service Charge Code of Practice and the technical accounting guidance issued by the Institute of Chartered Accountants in England & Wales (ICAEW).

As part of the overall estate management proposal for Sunnydale Close, Surfleet, Encore has been asked to put forward an outline of the management aspects for the Public Open Space to help discharge the planning conditions relating to the ongoing management of the Public Open Space. This outline is designed to provide confidence to third parties that the management provision is adequate to undertake the maintenance and upkeep of the Public Open Space set to form part of the managed areas into perpetuity.

3.0 Management Company Structure

The future management of the communal areas forming part of Sunnydale Close, Surfleet, have been set up using a private Residents Management Company (RMC) structure. In simple terms a management company will be incorporated which each owner on the development will become a member of.

The Management Company will be formed and is covenanted via each plot transfer to maintain and upkeep the private communal areas of the development including the Public Open Space. The management company will appoint a managing agent (in this instance Encore Estate Management Limited) to administer the obligations of the management company set out in the transfer documents for each property. A reciprocal covenant within the transfers obliges the owners/shareholders of the company to pay an annual service charge to safeguard the maintenance and upkeep of the communal areas. The transfers will more specifically refer to the service charge as a variable rent charge. Should the annual rent charge not be paid the transfers allow for recovery action to be escalated to enforce the collection of the debt ensuring at all times adequate cash flow.

4.0 Our Understanding of the Public Open Space

The Public Open Space forming part of the development is to be laid out as shown as 118–MCCP – 01 Rev A, dated 23-02-2021. The Public Open Space area is designed to be of a low maintenance amenity space and will be laid to two grass seed variants (Wildflower mix predominantly around the curtilage of the site and strong lawn grass on the central open space). The use of wildflower mix on the perimeter of the scheme is specifically designed to promote habitat creation and biodiversity. The mature trees within the POS will be maintained on an adhoc basis as needed.

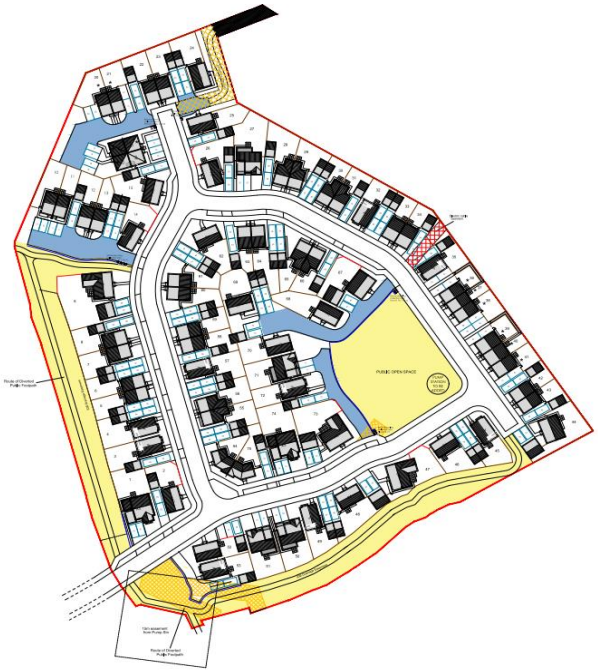


Illustration 118–MCCP – 01 Rev A, dated 23-02-2021

5.0 Public Open Space Management

The management of the Public Open Space and wider managed areas are to be undertaken by Encore Estate Management Ltd. The funding for managing the development will be generated by way of a rent charge payable by the private property owners as prescribed by each properties transfers (TP1).

5.1 Handover

Prior to handover Encore will liaise with the developer to obtain full as-built /construction drawings, CDM pack including any specific maintenance requirements and installing contractor details. Encore and the developer will go through a snagging process to ensure the Public Open Space areas and wider managed areas have been laid out as per the approved drawings and oversee any rectifications works.

5.2 Health & Safety Risk Assessment

At the point of handover Encore will appoint a competent health and safety consultant to undertake a risk assessment across the Public Open Space as part of the wider estate risk assessments. Any actions which arise as part of this assessment will be discussed with the developer or actioned by the agent on behalf of the management company. As part of the above risk assessments we expect a recommendation will be made to carry out periodic inspections of the Public Open Space (six monthly as a minimum) to monitor its condition and upkeep.

5.3 Dedicated Estate Manager

To oversee the development Encore will appointed a dedicated estate manager to the scheme who will have overall responsibility for all aspects of the management including financial, legal, management and maintenance. As part of their role they will attend site on a minimum of a six monthly basis to visually inspect the Public Open Space and wider estate to ensure there are no obvious visual signs of damage and identify any reactive maintenance needs. The estate manager will also be responsible for ensuring the relevant external contractors are engaged to undertake cyclical maintenance onsite. Prior to any engagement, all external contractors will first be required to satisfy Encore's internal contractor approval process.

5.4 Grounds Maintenance

In terms of physical upkeep and given the relative simplicity of the managed areas, we do not anticipate significant cyclical maintenance being required across the development save for regular grounds maintenance and ongoing monitoring and record keeping. The annual grounds maintenance will form part of a planned maintenance schedule and will be budgeted for within the reoccurring annual service charge. A further general maintenance provision will be included within the cyclical budget to allow for reactive maintenance during the course of an average year. The annual service charge will also include a reserve provision which is ring fenced each year for larger non-cyclical maintenance/works including the periodic treating and eventual replacement of the acoustic fencing and play space forming part of the managed areas.

The grounds maintenance contractor will provide oversight on the scheme and report any obvious issues to the estate manager to address. All budgets will be adjusted annually to meet the needs of the estate for the subsequent year. The maintenance of the landscaping features are more specifically outlined in the table below. In compiling the maintenance regime we do not envisage significant issues to arise outside the routine maintenance requirements.

Maintenance Schedule	Required Action	Frequency	Responsible
Regular Maintenance	Litter and debris removal.	On each visit.	Grounds maintenance contractor
	Grass cutting of open space areas and grass pathway.	Minimum 16 times per annum (principally during growing season).	Grounds maintenance contractor
	If applicable manage other vegetation and remove nuisance plants/weeds.	Monthly (at start, then as required).	Grounds maintenance contractor
	Tidy all dead growth/leaf clearance before start of growing season.	Annually.	Grounds maintenance contractor
	Cut back and prune hedging/shrubbery where present to encourage growth once established.	Minimum 3 times per annum (or as required to establish).	Grounds maintenance contractor
Occasional Maintenance	Grass cutting of easement strip and site perimeter Wildflower Mix and Meadow Grass Mix Areas (after first year of establishment)	Typically cut 2 times per annum with a main hay cut in summer with either an Autumn and/or Spring cut to circa 50mm. Arising's to be left on the ground after each cut for circa 1 – 7 days before collection to promote seed shedding.	Grounds maintenance contractor
	Re-seed areas of poor vegetation growth.	As required.	Grounds maintenance contractor
	If applicable prune and trim mature/ new trees and remove suckers growth, re-stake etc.	As required.	Grounds maintenance contractor
	Apply selective weed and feed treatments where appropriate (Lawn grass only)	As Required	Grounds maintenance contractor
Refuse /recycling collection areas	Inspect refuse collection areas to keep litter free and remove weeds report any issues to the estate manager.	Monthly	Grounds maintenance contractor
Remedial Actions	Repair any damage malicious or otherwise re-turfing.	As required.	Grounds maintenance contractor
Monitoring	Visually inspect open space, landscaping and trees report to estate manager.	On each visit	Grounds maintenance contractor

	Periodic site inspection to monitor contractor attendance/workmanship and identify reactive maintenance needs.	Minimum 6 monthly	Estate Manager

Table 1 – Grounds Maintenance Schedule

6.0 Insurances

As part of the management of the estate Encore will take out standard public liability insurance cover across the open space areas. Property liability cover will be in place to a limit of indemnity of £5,000,000 and will typically be placed with a top five rated underwriter.

7.0 Summary

A robust management structure has been adopted by the developer to safeguard the long term management and maintenance of the site into perpetuity. The management company structure is a tried and tested method of allowing a development to manage its own affairs with the input of owners and is widely adopted across the country. In this instance the transfers provide the reciprocal covenants to ensure the income generation for the RMC to provide the services of the estate.

February 2021
Encore Estate Management Limited