Residential development The Maples, High Road, Weston, Lincolnshire
Open Space Maintenance Plan and Estate Management Overview.

1.0 Location & Overview

The scheme comprises a residential development of 150 Freehold Properties situated 10 miles from Weston Hills in Lincolnshire. The development will incorporate the private management of various areas of public open space (POS), soft landscaping, SUD's infrastructure and 1x LEAP, identified on the Master Conveyance, Drawing No: WES/MCP/001 dated 18.12.20.

2.0 Introduction

Persimmon Homes East Midlands will pass on the management of the estate to: Encore Estate Management, whom 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 this development, Encore has been asked to put forward an outline of the management aspects for the POS, SUD's infrastructure and 1x LEAP to help alleviate the planning concerns relating to the ongoing management of the estate. This outline is designed to provide confidence to third parties that the management provision is adequate to undertake the maintenance/upkeep of the public open space set to form part of the managed areas into perpetuity.

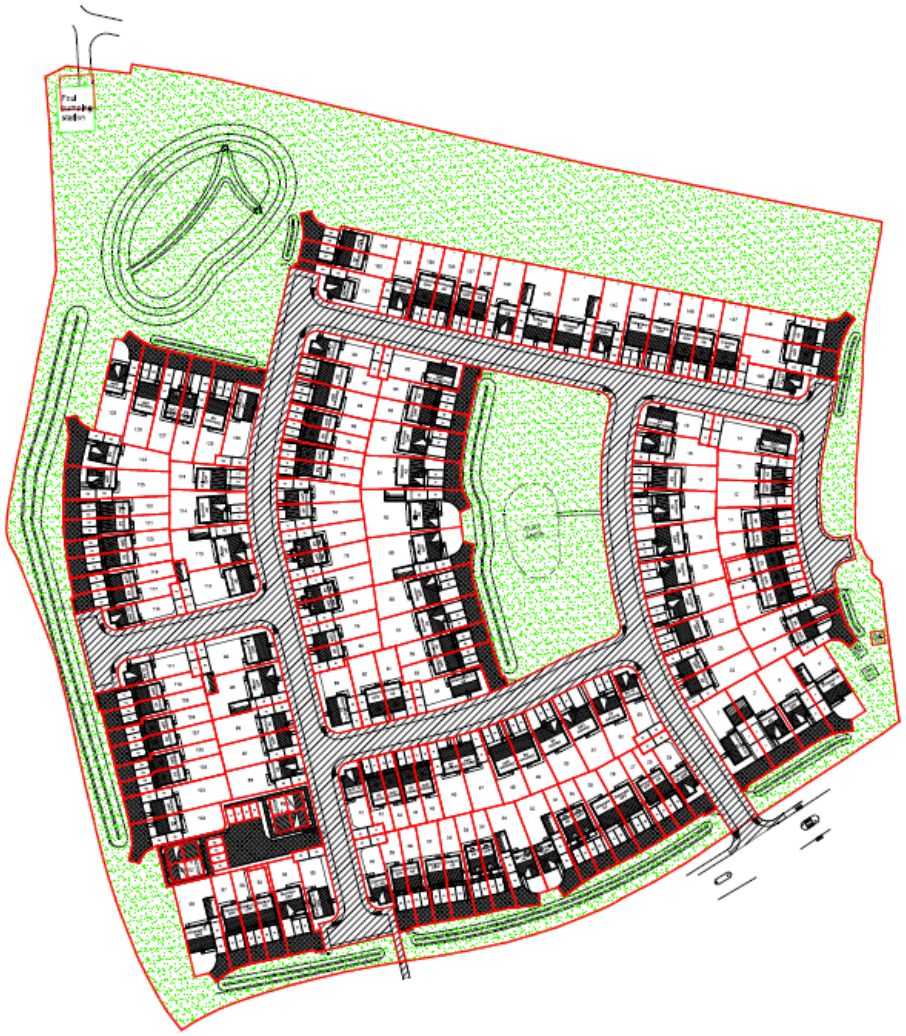
3.0 Management Company Structure

The future management of the communal areas forming The Maples has been set up using a private Residents Management Company (RMC) opposed to an embedded management structure. Whilst both structures work, from a practical perspective the RMC model is more suited on smaller schemes where the RMC has a responsibility and gives owners ownership for the purposes of managing the site.

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. In return 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 maintenance charge. Should the annual service 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

Our brief in respect of the development is to undertake the estate management of the public open space areas, and structured landscaping areas, SUD's infrastructure and play equipment as shown on the master conveyance drawing below, delivering a high standard of safety and landscape maintenance across the site ensuring a high quality landscape setting for local residents



Master Conveyance Drawing, Drawing No: WES/MCP/001 dated 18.12.20

5.0 Public Open Space Management, SUD's Infrastructure and Play Equipment

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 service charge payable by the private property owners as prescribed by each properties transfer (TP1).

The purpose of this open space management plan is to outline the key management aspects of the development to ensure that the open space areas remain an attractive and functioning asset for the surrounding properties and area. The principle management objective include:-

1. Financial sustainability through the robust collection of service charge income, prudent expenditure and setting aside reserves, to ensure the provision of services.
2. Meeting the maintenance objectives set out in the Landscape Management Plan.
3. Provide a safe environment for occupiers of the surrounding properties to enjoy.

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 POS, SUD's infrastructure and play area have been laid out as per the approved drawings and oversee any rectification 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 POS (quarterly as a minimum) to monitor its condition and upkeep.

5.3 Dedicated Estate Manager

To oversee the development Encore will appoint 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 quarterly basis to visually inspect the public open space, SUD's infrastructure and play equipment 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. The estate manager is supported by a dedicated service charge accountant for the scheme and assistant property manager.

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, ongoing monitoring and record keeping.

The annual grounds maintenance will form part of a planned maintenance schedule for the scheme 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 eventual long-term replacement/overhaul of the site infrastructure and play equipment.

The grounds maintenance contractor will provide oversight on the scheme and report any obvious issues to the estate manager to address each visit. 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 across the site.	On each visit.	Grounds Maintenance Contractor.
	Tidy all dead growth/ leaf clearance before start of growing season.	Annually.	Grounds Maintenance Contractor.
	Mowing of grass.	Fortnightly March – October.	Grounds Maintenance Contractor.
	Inspect communal lengths of fencing and walling and communal hard surfaced areas to maintain site security.	On each visit.	Grounds Maintenance Contractor and Estate Manager during site visits.
	Undertake regular inspection of communal hard surfaced areas.	On each visit.	Grounds Maintenance Contractor.
	Meadow/wild flower mix – Meadow grass cutting, cut to approximately 50mm in height.	After the establishment period minimum 2 times per annum (March/April and a second cut in August/September). Weed control activities by spot treatment to individual weeds as necessary.	Grounds Maintenance Contractor.
	Planting, tree and hedge planting to be inspected at each maintenance visit for signs of disease or damage.	On each visit.	Grounds Maintenance Contractor.
Occasional Maintenance	Top up mulch to a depth of 75mm to beds and radius around each tree as required.	As required.	Grounds Maintenance Contractor.
	Clean surfaces to prevent excessive weed growth on public paths and paved areas to avoid trip and slip hazards.	Annually.	Grounds Maintenance Contractor.
	Grass and wild flower areas reinstatement.	As required.	Grounds Maintenance Contractor.
	Apply weed and feed treatments to grassed areas.	As required.	Grounds Maintenance Contractor.
	Repair any damage, malicious, or otherwise re-turfing/seeding. Restock border and hedgerows are required.	As required.	Grounds Maintenance Contractor.
	Clear all bases of hedges and ensure ground is clear from litter	Quarterly.	Grounds Maintenance Contractor.
Monitoring	Periodic site inspection to monitor contractor attendance/workmanship and identify reactive maintenance needs.	Minimum 3 monthly.	Estate Manager in conjunction with Grounds Maintenance Contractor.
	Visually inspect open space, landscaping elements and trees – report to Estate Manager.	On each visit.	Grounds Maintenance Contractor.

Table 1 Landscape Maintenance Activities

5.4.1 Trees

Mature trees will be inspected by a qualified Arboricultural Consultant on a minimum every 18 months for safety purposes and records maintained. Pruning and cutting back activities will be determined by the Arboriculturist focusing on the health of the trees and identifying any safety concerns i.e. removing overhanging branches from pathways. Activities will be undertaken avoiding the bird nesting season between March and August. Reactive

works will be undertaken via either the general maintenance provision or through the accumulated reserves set aside on the development annually.

5.5 SUD's Infrastructure (attenuation basin/swales)

SUD's infrastructure across the open space includes an attenuation basin on the northern boundary. Whilst this feature is considered to be low maintenance, with activities centered around the soft landscaping maintenance identified in section 5.4 Grounds Maintenance. Periodic inspections will be carried out by the estate manager and a competent drainage contractor will also be employed as required to check on the condition and carry out more detailed inspections. Principle maintenance activities will include:-

1. Regular inspections to identify, blockages, clogging, deterioration, and erosion.
2. Soft landscape maintenance in accordance with the Landscape Management Plan.
3. Regular litter picking and waste removal.
4. Checking and cleaning of inlet and outlets.
5. Periodic removal of sediment from pre-treatment areas as recommended by a competent drainage contractor.

A RoSPA risk assessment report covering the SUD's infrastructure will be supplied by the developer as part of the handover. Whilst we expect this to show that there are no unusual risks associated with the basins but any actions will be reviewed and undertaken in conjunction with the developer.

5.6 Play Equipment

The safety of children on the playgrounds does not depend solely upon the initial design of the site and the selection of equipment. Its continued management and the provision of high-quality inspection and maintenance programs are essential if safe opportunities for children to play creatively are to be preserved. There is no specific legal responsibility to provide inspection and maintenance programs, but such procedures are recommended by the Department for National Heritage, the British Standards Institute, the Health and Safety Executive, Insurers and RoSPA.

In order to achieve the above and in addition to the annual Health and Safety Risk Assessment a separate inspection strategy will be adopted across the proposed play equipment. The inspection strategy adopts a hierarchical approach incorporating the following:-

a. Annual Main Inspection – carried out by a specialist inspector to look at all points in (b) & (c) minor and major wear and tear, and long-term structural problems linked with changes in compliance.
b. Operational Inspections – Detailed condition check to identify all visual aspects below but also consider wear and tear.
c. Visual Inspections – Basic visual condition check to identify faults, vandalism.

The frequency of all inspections will ultimately depend upon the design, levels of use and misuse, however as this is unknown at this stage, we have allowed for the full annual inspection with the addition of 3 operational inspections providing quarterly coverage by a suitably qualified RPII inspector. The full annual Inspection will be undertaken by RPII Level 3 qualified inspector, such as RoSPA. Visual inspections will also be undertaken by the estate manager during site inspections.

	J	F	M	A	M	J	J	A	S	O	N	D
Annual ROSPA Inspection							✓					
Operational Inspections	✓			✓						✓		

The above play strategy will be subject to change with the frequency of inspections being altered to react to usage/misuse and findings.

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 via one of its nominated brokers. 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. This will ensure that in the event of a claim the policy is more likely to respond.

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 RMC management structure is a tried and tested method of allowing a development to manage its own affairs and is widely adopted across the country. In this instance the transfers provide the reciprocal covenants to ensure the income generation for the agent to provide the services of the estate. The agent in turn engages with the necessary third party contractors to provide the services.

Encore Estate Management Limited
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