



ESTATE MANAGEMENT POLICY

Sandy Young

Contents

1. Introduction	3
2. Property and Environment	3
4. Complaints	6
5. Equality, Diversity & Inclusion	6
6. Data Protection	6
7. Policy Review	7
8. Associated Policies & Guidance	7
9. Responsibilities Chart	7
Policy Assessment Checklist	8
Health & Safety Assessment	8
Equality Impact Assessment	8
Data Protection Impact Assessment	9

Policy	Estate Management Policy							
Version reference	5.2							
Approved by	Board of Management							
Date of Approval	July 2025							
Review Period	5 years							
Review Due	June 2030							
Policy Review	Director of Housing Management							
Who this policy affects	Board		Customers	X	Contractors		Members of the Public	X
Where this policy affects	General needs		X	Supported			Office / staff base	

1. Introduction

- 1.1 The purpose of this policy is to outline how Almond Housing Association Limited (AHA Ltd.) manages its estates. This policy sets out how AHA will ensure that our estates are well managed and well-maintained resulting in an environment that is attractive, safe and secure.
- 1.2 AHA recognises that Estate Management is a vital part of our housing management role and a particularly important service for all our tenants and factored owners.

2. Property and Environment

Housing stock

- 2.1 The Association has a separate policy on ensuring that our housing stock is kept up to an acceptable standard through repairs and maintenance.

Common areas

- 2.2 To maintain high standards in common areas, such as stairs, entrances, bin stores, refuse storage areas, drying areas etc. The purpose is not just to have clean and safe areas but to reduce fly tipping and encourage effective waste removal. Additionally, we will encourage sustainable use wherever possible in conjunction with partners. AHA Ltd. will:
 - carry out regular (see 2.14) inspections and follow up any relevant matters;
 - in specified areas, provide contract stair cleaning and bin store cleaning services under a service charge, and follow up opportunities for expanding such services in other areas as required;
 - act promptly on any reports from the cleaning contractor regarding items requiring action
 - where contract services are not provided, seek to ensure that local residents agree to and maintain the required cleaning etc. rotas, but where agreement cannot be reached arrange for the work to be carried out and the costs recovered;
 - where problem areas are identified, seek to reach agreement on solutions with the residents involved;
 - ensure that where action is to be taken, that we communicate clearly with all residents what we plan to do and why;
 - Identify any items which can be reused or recycled

Individual gardens

- 2.3 To ensure that high standards are maintained in individual garden areas AHA Ltd. will:
- carry out regular inspections, especially during the main growing season;
 - where tenants fail to maintain their gardens to an acceptable level, ensure they are reminded of their responsibilities and their tenancy conditions are enforced;
 - ensure that the Garden Scheme policy is implemented for all tenants who qualify.

Communal gardens and landscape maintenance

- 2.4 To ensure high standards in communal garden areas AHA Ltd. will ensure that, where residents are responsible for maintenance, they fulfil their responsibilities as in para. 2.3 above. Where AHA Ltd. landscape contractors maintain the garden areas we will monitor their work to ensure the required standards are achieved.
- 2.5 AHA Ltd. will appoint appropriately qualified contractors to maintain general landscape areas and will monitor performance to ensure that they achieve the required standards.

General environment

- 2.6 When visiting properties AHA staff will monitor the appearance of each area and, where necessary, ensure that we take any action required where this is our responsibility, or that we liaise with other authorities or agencies to ensure that appropriate action is taken, to maintain an acceptable level of environmental amenity.
- 2.7 Such action will cover matters such as general litter, street cleaning, lighting, abandoned vehicles, graffiti, parking of caravans or other large vehicles, conditions of footpaths, or problems caused by particular species of insects, birds or animals, etc.

Vermin and pest control

- 2.8 AHA Ltd. will encourage tenants to report incidents of vermin and/or pest infestation to relevant agencies and, where necessary, take action to deal with any property or environmental issues that are our responsibility. For example, if tenants identify areas of dumping or poor refuse collection that are attracting vermin, we will follow this up within 48 hours.

Pets

- 2.9 If a customer's pet fouls or causes damage to the common areas, we will recharge them the costs of cleaning up or making good any damage. If appropriate we may involve West Lothian Councils dog warden or revoke permission for the pet via the tenancy agreement.

Contact with tenants and residents

- 2.10 As part of the arrangements for fostering good tenant/landlord relationships AHA Ltd. will encourage tenants and residents to take an active interest in and participate in maintaining an acceptable local environment.
- 2.11 This will be handled via our communications strategy and community impact strategy.

Estate management visits

2.13 Officers will carry out regular (see 2.14) estate visits to monitor standards, in particular looking out for:

- vandalism or graffiti; (Housing Officer)
- poorly maintained environments, e.g. gardens, open spaces, stairs, bin stores, drying greens etc.; (Housing Officer)
- path and open space inspections; (Property Officer)
- parking problems or abandoned vehicles; (Housing Officer)

Officers will report things they see when carrying out other duties, that is to say one should always be aware of the estates as you travel through it.

We will invite locally elected representatives, Police representatives and local tenants and factored owners to participate in any formal inspections we arrange where applicable.

The results of each visit will be recorded on the Housing Management System and follow-up action taken as detailed in the Estate Management procedure.

2.14 Regular visits are defined as:

- Close inspections and common areas minimum of once a month
- Garden areas twice per year
- Open spaces each quarter
- Paths and roads once per month

Owner-occupiers

- 2.15 AHA Ltd. will seek the support and involvement of owner occupiers in our efforts to achieve our estate management objectives. This will mainly involve owners from the Right to Buy process in blocks of flats receiving a factoring service from us but may also involve owners from subsequent private sales.
- 2.16 AHA Ltd. will ensure that any sale agreements and information for owners clearly state their responsibilities about common maintenance. We will also ensure that, where required by the Factoring policy, we consult with owners over proposed planned maintenance or major repairs projects.

3. Complaints

- 3.1 Complaints about the way AHA Ltd. deals with (or does not deal with) estate management issues will be dealt with in accordance with our Complaints policy.

4. Equality, Diversity & Inclusion

- 4.1 Almond aims to ensure that equality, fairness, dignity and respect are central to the way we work and how we treat our customers. We support diversity and uphold equal opportunities in all areas of our work as an employer and service provider.
- 4.2 Almond will not discriminate against tenants, staff, visitors, suppliers or others based on their age, sex, sexual orientation, race, disability, religion or belief, marital status, pregnancy and maternity or gender reassignment (collectively referred to as 'protected characteristics' in the Equality Act 2010).

5. Data Protection

- 5.1 Our policies and procedures foster an approach of 'data protection by design and by default'. What this means in practice is that:
 - Policies and procedures consider data protection issues, ie how to protect the data subject served by the policy or procedure;
 - New systems, services, products and business practices involving personal data are designed and implemented to ensure personal data is protected by default;
 - That the Data protection principles and safeguarding of individuals' rights (such as data minimisation, pseudo anonymisation, and purpose limitation) are clear in the policy or procedure;
 - And that if the policy or procedure aims to provide service to vulnerable groups (e.g. children) that the personal data is treated with extra protection.

What this requires users of this policy to do is:

- Make sure that staff understand why data protection is important for the implementation of this policy, for instance via training or by reading the data protection policies;
- If we are undertaking a review of the policy, change to process or change to system, that we must consider doing a Data Protection Impact assessment, if the change is likely to result in a high risk to individuals.
- It is also good practice to do a DPIA for any other major project which requires the processing of personal data.

We will consult our data protection officer, if there is doubt over these requirements.

6. Policy Review

6.1 This policy will be reviewed every 5 years or as required due to legislative or regulatory change. The review will be completed by the Director of Housing Management and circulated to Senior Management Team for approval.

7. Associated Policies & Guidance

This Policy takes account of the following documents:

- Rules of Almond Housing Association
- Equality & Diversity Policy
- Openness & Confidentiality Policy
- Vulnerable Tenants Strategy
- Community Engagement Strategy
- Recharge policy

8. Responsibilities Chart

8.1 The chart below illustrates the responsibilities of all staff in relation to this policy.

	Board	SMT	Director of Housing Management	Housing Manager	Operations employees
To Implement the policy					✓
Ensure Almond HA staff have an understanding of Policy			✓		
Ensure team members implement policy				✓	
Policy Review			✓		
To ensure that there is an Estate Management policy	✓				
Approve policy		✓			

Policy Assessment Checklist

Health & Safety Assessment

Does this policy have the potential to affect:

	Yes	No
Lone Working	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Safety and/or wellbeing of customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Safety and/or wellbeing of staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Equality Impact Assessment

Does this policy have the potential to affect:

	Yes	No
Age	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Disability	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gender reassignment	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Marriage and Civil Partnership	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pregnancy and Maternity	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Religion or belief	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sex	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sexual orientation	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Race	<input type="checkbox"/>	<input checked="" type="checkbox"/>

If you have answered 'Yes' to any of these points, please complete a full Equality Impact Assessment. If you have answered 'No', you need take no further action in completing an Equality Impact Assessment.

Data Protection Impact Assessment

Carrying out a Data Protection Impact Assessment [DPIA] will be useful to any project – large or small – that:

- Involves personal or sensitive data about individuals
- May affect our customers' reasonable expectations relating to privacy
- Involves information that may be used to identify or target individuals

A Data Protection Impact Assessment [DPIA] must be completed if the policy involves one or more of the following (please tick each that apply to this policy):

Evaluation or scoring	<input type="checkbox"/>
Automated decision-making with significant effects;	<input type="checkbox"/>
Systematic monitoring	<input checked="" type="checkbox"/>
Processing of sensitive data or data of a highly personal nature	<input type="checkbox"/>
Processing on a large scale	<input checked="" type="checkbox"/>
Processing of data concerning vulnerable data subjects	<input type="checkbox"/>
Innovative technological or organisational solutions	<input type="checkbox"/>
Processing that involves preventing data subjects from exercising a right or using a service or contract	<input type="checkbox"/>
Use systematic and extensive profiling or automated decision-making to make significant decisions about people	<input type="checkbox"/>
Process special-category data or criminal-offence data on a large scale	<input type="checkbox"/>
Systematically monitor a publicly accessible place on a large scale	<input type="checkbox"/>
Use of new technologies involving significant innovation	<input type="checkbox"/>
Use profiling, automated decision-making or special category data to help Make decisions on someone's access to a service, opportunity or benefit	<input type="checkbox"/>
Carry out profiling on a large scale	<input type="checkbox"/>
Process biometric or genetic data	<input type="checkbox"/>
Combine, compare or match data from multiple sources	<input type="checkbox"/>
Process personal data without providing a privacy notice directly to the individual	<input type="checkbox"/>
Process personal data in a way that involves tracking individuals' online or offline location or behaviour	<input type="checkbox"/>
Process children's personal data for profiling or automated decision-making or for marketing purposes, or offer online services directly to them	<input type="checkbox"/>
Process personal data that could result in a risk of physical harm in the event of a security breach	<input type="checkbox"/>
There is a change to the nature, scope, context or purposes of our processing	<input type="checkbox"/>

If a DPIA is not carried out, please summarise the reasons below