



Management Strategy for

Bellway Homes

Wessex

Halyards

Hayling Island, Havant

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Date of Initial Proposal | 23 June 2014

Delivering straight forward property management solutions for
developments of any size and complexity

Document Control Sheet

Amendment Information

Date	Author	Reason for amendment

Development Notes

This Management Proposal has been prepared in respect of the estate management and maintenance of the above development. It has been compiled on the basis of the plans, information and specifications provided by the developer at the time of preparation.

Plans Received

Date Received	Plan Name	Plan Number	Revision
18 June 2014	Site Block Plan	1543 P 02	E
18 June 2014	Landscape Proposals Sheets 1-5	ID591.01-05	-

Please note

The contents of this proposal do not constitute a contract, part of a contract or warranty.

This management proposal and budget is an estimate based on information available at the time and is correct at the time of writing. Trinity reserve the right to amend both without prior notice should the developer's plans or legal requirements change.

In addition, Trinity reserve the right to update both the management proposal and the budget on an annual basis, including for the period prior to the development being handed over to our management.

About this Proposal

Trinity Estates provide a scheme specific Management Proposal to our developer clients to show how we intend to manage their property. The proposal assists both our own Legal Team and the developers' solicitors when setting out the management requirements of Leases, Transfers and Management Agreements.

There are 3 main parts to this proposal:

- Development Notes
- Service Charge Budget and Matrix (where applicable)
- Service Charge Summary

The **Development Notes** summarise our understanding of the development and our approach to its management. The notes are based on information provided by the developer and our knowledge and experience of managing similar developments. Items that we are unsure of are shown as "Assumptions" and require confirmation from the developer.

The **Service Charge Budget** outlines the estimated maintenance costs for each element of the development. Different service charge headings are used to ensure that only those units that benefit from a particular service will contribute towards its associated costs. If there is more than one charge heading then costs are broken down plot by plot on an attached Matrix that shows what each unit will pay annually for each charge heading and, as a total.

The **Service Charge Summary** provides a detailed description of each maintenance item within the budget.

It is important that all 3 parts of the proposal are looked at in conjunction with each other to provide a full picture of our management proposal.

How we can assist you during sales

Trinity's goal is to offer a high quality and cost effective management service to both developers and purchasers. We have developed a number of features designed to support sales staff and to provide reassurance to prospective purchasers concerning the on-going management of the development:

- Management Information Sheets are provided to the Developer's Sales Staff for handing to prospective purchasers. These include a copy of the specific Service Charge Budget, Matrix, Budget Summary and a "Your Questions Answered" information sheet.
- Following handover into our management we will write to all owners enclosing a full "Residents Information Pack" which provides more comprehensive details about Trinity Estates, the services we will provide and who to contact in particular situations. In addition, copies of the "Information Pack" will be supplied to your sales staff in order to provide background information to Trinity Estates.
- Management support is available to your sales staff to answer questions regarding the management of the development and the Service Charge as they arise.

Development Notes

A new development consisting of 92 private houses and 39 Housing Association (HA) houses – 131 units in total

All units on the development will be required to contribute equally towards the Service Charge for maintenance and upkeep of the areas of open space around the development

The main estate roadways and their associated maintenance, surface water drainage and lighting will remain private and will be the responsibility of the Management Company

Responsibility for any other shared driveways will be divided up amongst those units that have use of each driveway

The surface water drainage systems will be gravity fed and will not require pumping

The Management Company will be responsible for the following areas of open space within the development:

- The large area of open space that runs all the way along the Eastern boundary of the development
- The long strip of POS (including the native hedgerow and the ditch) that runs down the centre of the development
- The strip of soft landscaping that runs behind plots 13, 14 and 33-38

The Management Company are responsible for the footpath and associated soft landscaping that runs between plots 109 and 110 out to St Margarets Road

Public liability insurance will be included within the Service Charge to cover the managed areas of the development

Refuse removal will be provided by the Local Authority as part of the Council Tax Charge

The Management Company are responsible for any sections of fencing or knee rails that are located within the managed areas

BUDGET SUMMARY



No.	Item	Budget for the year	NOTES
1	Landscape Maintenance	£9,600	Landscape maintenance of communal gardens, includes cutting of grass, weeding, tending of flower beds, borders and shrubs, litter picking, sweeping of walkways etc. Frequency and duration of visits will vary throughout the year i.e. more frequent and longer during growing season, less frequent and shorter during winter months
2	Drainage Maintenance	£720	Maintenance of the surface water drainage system including regular inspections, clearing as required etc
3	Electricity Charges	£1,890	Assuming low consumption lighting throughout. Includes estimated amounts for external lighting
4	General Repairs & Maintenance	£1,200	Budgetary costs to cover for day to day repairs of communal items
5	Private Roadway/Carpark Maintenance	£2,400	Maintenance of the un-adopted roadway and its associated lighting including regular sweeping, replacement of any light bulbs etc.
6	Public Liability Insurance	£530	Includes comprehensive Public Liability cover
7	Health and Safety Assessment	£816	** The instruction of professional surveyors to carry out and certify inspections for required Health and Safety, Fire Risk and General Risk assessments
8	Accountancy Fee	£420	Annual fee for independent certification of Service Charge Accounts
9	Management Fee	£9,432	Fixed Management Fee based on £60 plus VAT per plot (not a percentage of total Service Charge).
10	Banking Charges	£63	Bank Charges relating to scheme trustee bank account
11	Estate Sinking Fund	£250	A fund designed to build up and pay towards the future costs of the estate and any associated major works
12	Private Roadway Sinking Fund	£250	A fund designed to build up and pay towards the future costs of the private roadway and pavement re-surfacing and any associated items that may include, such as drainage, street lighting, etc.
13	Arboricultural Sinking Fund	£500	Contribution to the arboricultural fund for future tree and planting works
Total		£28,071	

**The Health & Safety reports are undertaken by Trinity2

***The Company Secretarial compliance role is undertaken by Trinity2

2Trinity is a trading name of Trinity (Estates) Property Management Limited