



Management Proposal

Site Name:	Wildhouse Lane
Location:	Milnrow
Developer:	Lancet Homes
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Submission Date:	19/06/2023
Revision:	A

Taking Care of Property



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Executive Summary

Trinity (Estates) Property Management Limited are pleased to be invited to tender for the future of management of your development. This proposal sets out the services we will provide and how we will organise them to ensure the smoothest possible transition into management.



Proactive Management



Health & Safety Expertise



Financial Control



Excellent Customer Communications

About Trinity

At Trinity, we have worked hard to build an excellent reputation with our clients. Our extensive residential management portfolio covers mixed-use, riverside & city apartment developments, housing estates with public open space and new and refurbished developments.

With extensive knowledge and expertise, Trinity is driven by exceptional people with a commitment to delivering a high service level to our customers.



6

National coverage
split into 6 regions



44

Field Based
Property Managers



94,000

Homes in
management



53,000

Awaiting
handover

Our regionally based Property Managers provide effective localised services and are supported by the full Trinity team based at our headquarters in Herefordshire. Working together, they ensure that the services we provide focus on the local community they serve, and we deliver services with the benefits and security that come from an established national service provider.

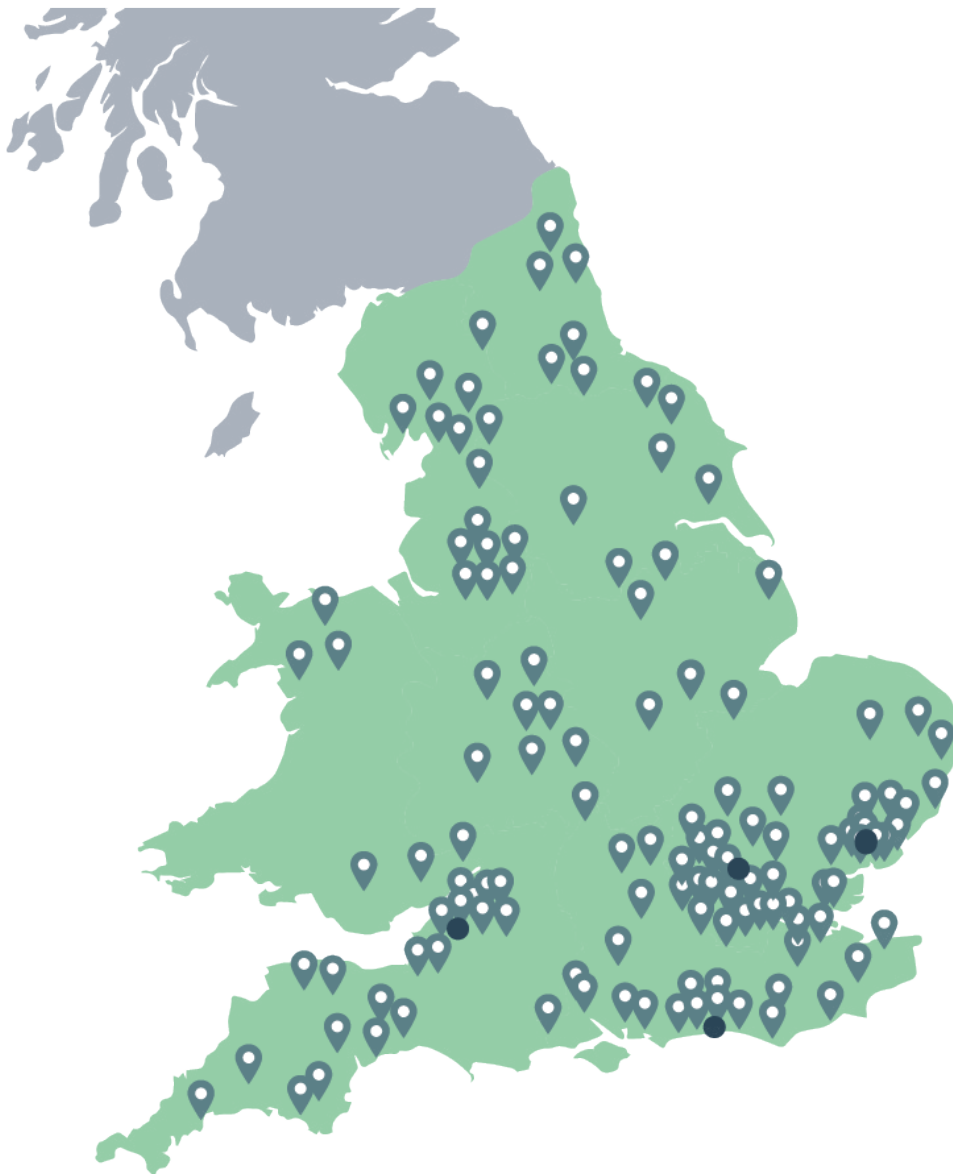
We are proud to have been the first managing agent to achieve the coveted full ARMA-Q (Association of Residential Managing Agents) status. This allows us to continually benchmark the quality of the services provided to our clients and means that we adhere to agreed regulated standards.

National Coverage

Providing tailored Block & Estate Management with a national coverage

Working with leading house builders across the country, Trinity provide residential management services nationally. Our property professionals are home based and are located locally to the sites they manage.

They are fully supported by a comprehensive team in our Hertfordshire head office which comprises, Surveyors, Accountants, Legal professionals and a large customer support team.



Core Services

Utilising our teams of dedicated New Business Managers, Handover specialists and 44 Property Managers located Nationally. Backed up with full financial, legal and administration teams at our Head Office. Trinity provide a one stop shop for all property management services.



Property Management - New Build

- Technical support and advice from planning through to completion
- Full budget preparation for clients
- Dedicated handover team to ensure smooth management transition from Developer to Trinity to Residents
- National presence with localised service



Property Management - Residents Management Company

- Residential Management Company accounting & management -full finance, surveying and legal health check completed when an RMC comes into management
- Contractor management
- Experienced team of 44+ Property Managers, supported by extensive industry knowledge/expertise throughout the company
- On-line maintenance portal for residents and contractors
- National presence with localised service

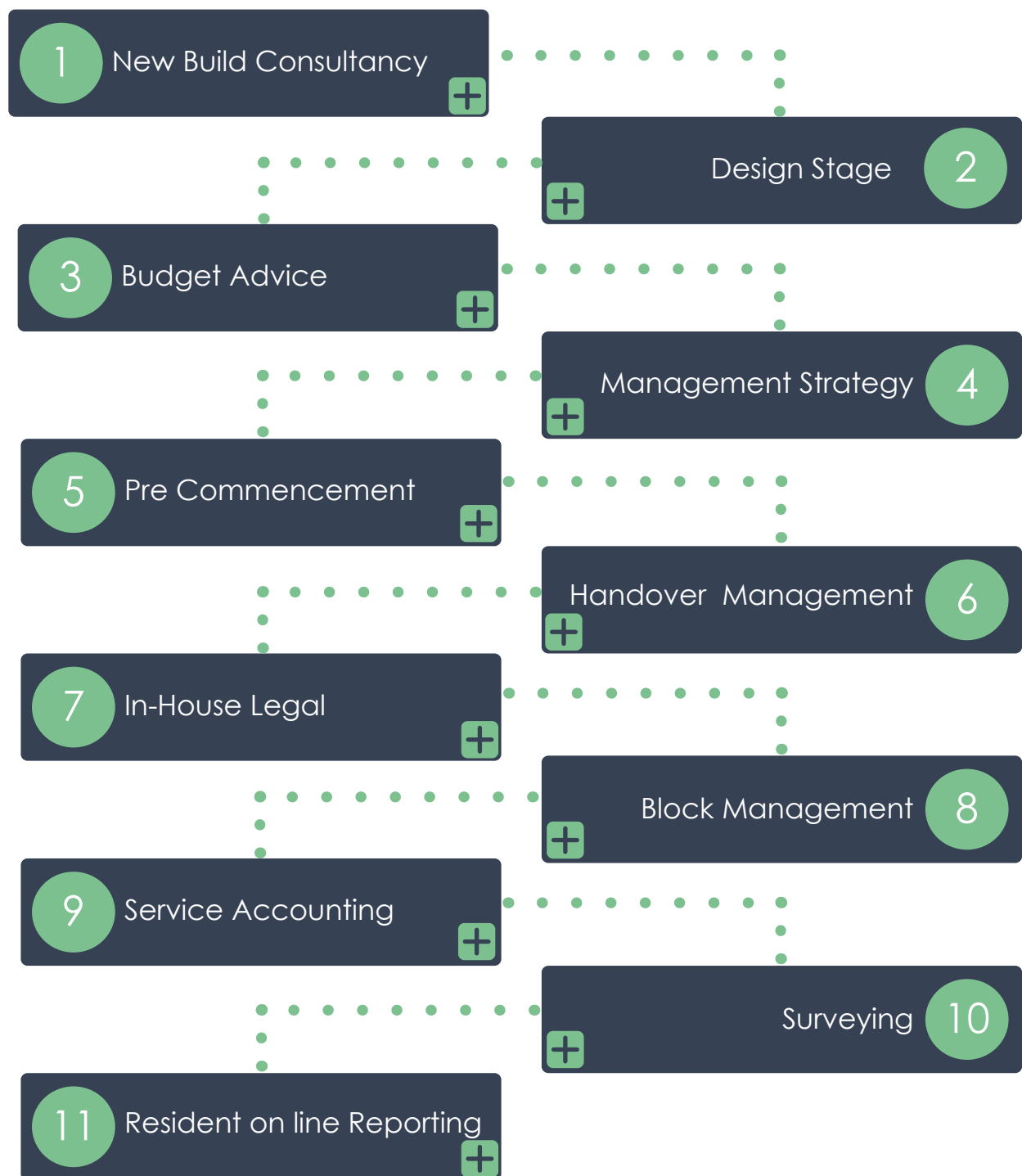


In House Services

- Finance
- Legal
- Insurance
- Surveying
- Ottimo Property Services Ltd – maintenance and cleaning contractor

All Under One Roof

By listening to our client's requirements, we can offer you an extensive range of property management services. We manage every project independently to ensure that your precise needs are met, and we tailor our approach to ensure you receive the right services required to deliver your project.



Handover Process



Management Packs



Sales Support



Resident Support



We recognise our services are an extension of yours and appreciate the significance of this when considering the Residents journey.

[illegible]

The 3 Elements

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.

The Development Notes



The Service Charge: Budget



The Service Charge: Summary



Development Notes

A new development consisting of 47 houses

All 47 houses will be required to contribute equally towards the Service Charge for maintenance and upkeep of the open space areas within the development

The main estate roadways and their associated maintenance, surface water drainage and lighting will be adopted and will not be the responsibility of the Management Company

Responsibility for any private driveways will be divided up amongst the individual property owners and will not be the responsibility of the Management Company

There is a surface water attenuation tank located under the open space at the front of the development - this will be the responsibility of the Management Company

All other foul and surface water drainage systems located within the communal areas will be adopted and will not be the responsibility of the Management Company

There is no lighting for the Management Company to maintain

The Management Company will be responsible for all area of open space within the development

The Management Company will be responsible for the Local Equipped Area of Play

The Management Company will be responsible for 4 ponds within the development - the Management Company will need to ensure that any inlets, outlets, headwalls etc. remain free flowing and clear of any rubbish or debris

Any sections of fencing or railings located within the managed areas will be the responsibility of the Management Company

Arboriculturalist services will be provided to maintain the mature and protected trees within the development

The ecological hibernacula and the ecological wetland piles will be the responsibility of the Management Company – the Management Company will instruct a fully licensed ecologist to carryout annual inspections and subsequent maintenance works

All landscaping and ecological works will be carried out in accordance with the Landscape and Ecological Management Plan (BOW17.1303 Soccer Village, Milnrow: Landscape and Ecological Management Plan (LEMP))

Public liability insurance will be put in place to cover the managed areas

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

Prior to commencement of management of the development by Trinity, the developer (or the developer's solicitors) shall provide a list of all those documents that Trinity is to observe in their management. The Developer shall indemnify Trinity against any liability resulting from any omission in that list and any failure of Trinity to meet any obligation in a document not included in that list

The Developer and Trinity agree that Trinity's management of the development shall be on the same terms as its management of developments it has already taken into management on behalf of the developer

Budget Summary

Wildhouse Lane, Milnrow

Budget period ending 31/10/24

No.	Item	NOTES
1	Landscape Maintenance	Landscape maintenance of the open space areas, 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	Play Area Maintenance	Maintenance of the play equipment and its safety surface including treatment/painting as required etc
3	Lake/Pond/Water Feature Maintenance	Maintenance costs associated with the ponds, including any aquatic and marginal plant weeding/removal as necessary, maintenance of any water inlets, outlets and overflows, repair and maintenance of the banks etc
4	Drainage Maintenance	Maintenance of the surface water attenuation tank including regular inspections and clearing as required
5	General Repairs & Maintenance	Budgetary costs to cover for day to day repairs of communal items
6	Directors & Officers Insurance	This is to provide liability cover for the Directors of the Resident Management Company
7	Public Liability Insurance	Includes comprehensive Public Liability cover
8	Health & Safety Assessment	The instruction of professional surveyors to carry out and certify inspections for required Health and Safety, Fire Risk and General Risk assessments
9	Play Area Inspection Costs	Costs for regular Health & Safety inspection for play equipment and safety surface
10	Accountancy Fee	Annual fee for independent certification of Service Charge Accounts
11	Management Fee	Trinity Annual Management Fee for the first year of management (not a percentage of total Service Charge)
12	Company Administration/Secretarial Fee	Annual fee for the administration and filing of annual RMC accounts
13	Banking Charges	Bank Charges relating to scheme trustee bank account
14	Ecological Surveying Fee	Costs for the inspection of nature reserve areas, wildlife habitats, ie pond surveys, newt/vegetation inspections. These surveys will be carried out by fully licenced ecologists
15	Estate Sinking Fund	A fund designed to build up and pay towards the future costs of the estate and any associated major works
16	Arboricultural Sinking Fund	Contribution to the arboricultural fund for future tree and planting works
17	Play Area Sinking Fund	A fund designed to build up and pay towards the future costs of the play area including re-surfacing and associated items such as replacement play equipment, gates or benches etc

Projected Landscaping & Pond/Basin Inspection & Maintenance Schedule

	Week	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52
Description																																																					
Grass Cutting & Strimming																																																					
Shrub & Border Maintenance																																																					
Selective Weed and Aquatic Planting Control associated with the ponds																																																					
Tree Inspection & Maintenance																																																					
Hedgerows Inspection & Maintenance																																																					
Litter Picking																																																					
Visual inspections and maintenance of the Equipped Play Areas																																																					

Landscape maintenance of POS area, includes:

- cutting, edging, weeding and feeding of grass to ensure a healthy sward (this includes some areas of grassland that will only require cutting twice a year)
- tending of flower beds, borders and shrubs, including weeding, pruning, thinning out, restocking, replacement of failures, mulching etc.
- tending of trees, including weeding/spraying around trees, firming stakes and tie stakes, tie removal once trees established etc.
- hedgerows to be trimmed twice a year
- litter picking all the managed areas on the development as required

Maintenance of the ponds includes:

- aquatic and marginal plant weeding to ensure that the ponds do not become overgrown
- ensuring that the inlets and outlets at the headwalls remaining free flowing and clear of any debris by regularly litter picking and removing any build up of rubbish or debris from any inlets, outlets or headwalls associated with the ponds
- inspection, maintenance and repair of the banks as and when required to ensure that these do not become unstable

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.

Next Steps

Revision Requests:

Trinity have Developer and Residents clients. Both clients' needs differ greatly our New Business and Handover Teams work hard to ensure the services we are providing meet the needs of each client.

We won't knowingly underestimate charges to win instructions as this has a negative impact on both the developer and Trinity but we are happy to review service levels with you to ensure they meet your requirements fully.

Once you are happy with this proposal, please sign and date below

Name:

Position in Company:

Date:

Signature:

We would like to open communications with your Legal Team to start work on the Management Agreement. Please can you provide details of your appointed Solicitor

Company Name:

Contact Name:

Address:

Email:

Phone Number:

Submit