

Estate Inspection Procedure 2012

1 Introduction

1.1 This procedure outlines the responsibility of Croydon Landlord Services (CLS) in carrying out four-monthly Estate Inspections and its objective is to define what is expected from the following staff:

- **Tenancy Officer**
- **Responsive Repairs Representative**
- **Neighbourhood Caretaking Manager**

1.2 Estate Inspections are an essential part of the work of the above staff. Residents and the CLS are keen to have communal repairs and other estate management issues progressed as quickly as possible. This will happen only if progress is monitored and interlocked with appropriate actions to prevent the risk of repairs or other issues being carried forward to successive estate inspections.

1.3 An Estate Inspection is an inspection of the exterior and communal parts, facilities and grounds of an estate comprising blocks of flats or a mixture of flats and houses built on land managed by CLS.

- Streets of houses facing adopted footpaths or highways are not estates and do not need to be inspected.
- Areas of houses served by extensive footpaths and walkways located on CLS managed housing land, such as those in Field Way do need to be inspected.
- All Sheltered or Special Sheltered Housing schemes located in buildings managed by CLS must be included in estate inspections and internal communal areas need to be inspected as well as the exterior.

2 Estate Inspection Planning and Preparation

2.1 The Tenancy Manager is responsible for programming a cycle of three estate inspections and progress review meetings to be carried out during the year. Resident representatives can be selected from the Housing Sounding Board or formally constituted groups. Individual residents can also be invited at the discretion of the Tenancy Manager. Ideally, there should not be more than three representatives or individual residents in attendance or the inspection party may become too large for the inspection to be conducted effectively. The list of invitees

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should be compiled in consultation with the Resident involvement and scrutiny team and filed centrally by each tenancy manager.

Action: Tenancy Manager

- 2.2 There should be a dialogue between the Tenancy Manager, Neighbourhood Caretaking Manager and Repairs Technical Manager to ensure estate inspections are arranged with an understanding of when relevant officers are available.
Action: Tenancy Manager
- 2.3 Estate inspections should normally last about two hours up to a maximum of three hours and inspection areas need to be apportioned with that time allocation in mind.
Action: Tenancy Manager
- 2.4 Wherever possible inspections scheduled for the morning should start by 10:00 a.m. and afternoon inspections at 2:00 p.m. to avoid clashes with duty rotas and the lunch-period.
Action: Tenancy Manager
- 2.5 Monday and Friday inspections should be avoided although the wishes of Resident Representatives should also be considered.
Action: Tenancy Manager
- 2.6 The Tenancy Manager should circulate the schedule of estate inspections to all Ward Councillors in the District and Chairs and Vice Chairs of Community Housing Panels.
Action: Tenancy Manager
- 2.7 Tenancy Officers should circulate schedules of inspections for the forthcoming year to Resident Representatives and other regular invitees on the list. Ten days before each inspection the Tenancy Officer, should write inviting Ward councilors, send out letters to resident representatives using the format in Appendix 3 and send email reminders to other officers due to attend, confirming the meeting point
Action: Tenancy Officer/ Caretaking Manager
- 2.8 The scheduled dates for estate inspections are not to be varied without express written permission of the Tenancy Manager. Tenancy Managers should avoid cancellation or postponement of estate inspections at all cost and tenancy officers should be re-assigned to cover for absent colleagues if necessary. All parties need to be notified of any variations to the schedule.
Action: Tenancy Team

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- 2.9 The planned schedule of inspections and progress review meetings should be stored centrally in a shared and maintained computer file using the spreadsheet in Appendix 5, including essential monitoring information i.e. actual inspection dates, attendance and dates Action Plans posted. The same information will also be stored electronically in a file accessible in read-only format to resident representatives and Resident involvement and scrutiny team.

Action: Tenancy Manager, maintained by Tenancy Officers

3 Conducting the Estate Inspection

- 3.1 The Tenancy Officer will lead the inspection party and be responsible for ensuring that all issues identified at the inspection are progressed, including repairs. As lead officer, the Tenancy Officer is responsible for ensuring that all areas and items indicated on the Estate Inspection Checklist (appendix 2) have been thoroughly inspected and any defects or concerns have been noted by the appropriate officer.
- Action: Tenancy Officer**
- 3.2 The Tenancy Officer will complete an Estate Inspection Checklist form on site. The checklist is a summary not a detailed record of every issue identified during the inspection so the Tenancy Officer may also need to take separate notes about any tenancy related issues. At the end of the inspection the Tenancy Officer will sign and date the checklist to formally record what has been inspected.
- Action: Tenancy Officer**
- 3.3 The Responsive Repairs Representative is responsible for noting all necessary repairs identified on the day. The Neighbourhood Caretaking Manager is responsible for noting any cleaning, caretaking or grounds maintenance issues, including any items to be progressed via Area Enforcement Team. The Tenancy Officer is responsible for noting all other issues. The Tenancy Officer and other inspecting officers will consult attending Resident Representatives, Ward Members and Caretakers about the appropriate action points to be recorded.
- Action: Tenancy Officer, Responsive Repairs Representative, Neighbourhood Caretaking Manager**
- 3.4 Estate inspections should include all shared entrances and stairways in blocks on an estate. Garage areas forming part of an estate should also be inspected. Special attention should be given to identifying safety hazards, including defective paving, [potholes](#), floor surfaces or steps that could be tripping or slipping hazards (we must be able to demonstrate a regular and effective

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inspection regime in order to deal with civil injury claims).

**Action: Responsive Repairs Representative,
Neighbourhood Caretaking Manager, Tenancy Officer.**

- 3.5 All members of the inspection party should stay together, listen to one another and treat each other with respect; officers should avoid public disagreements. In the event officers or residents cannot agree about an issue, this should be noted for further input from the Tenancy Manager, Tenancy & Neighbourhood Services Coordinator or Repairs Technical Manager.
- 3.6 Tenancy issues such as items stored in communal areas or untidy gardens should be followed up discretely after the inspection by the Tenancy Officer to avoid time consuming door knocking and confrontations during the inspection.
- 3.7 Tenancy managers or senior tenancy officers will quality control the estate inspection the process by arranging spot checks on one estate inspection annually for each tenancy officer patch.

4 Action after the Estate Inspection

- 4.1 It is the responsibility of the Responsive Repairs Representative to arrange for repairs noted during the inspection to be ordered on the OHMS computer within five working days of the inspection. The Responsive Repairs Representative should then send the Repairs Action Plan to the Tenancy officer within 5 working days of the inspection using the form in Appendix 6. The Repairs Action Plan should list details of all the repairs identified at the inspection that have been ordered, planned or omitted. Where works cannot be ordered immediately pending other action (e.g. quotes) or further discussion, the Responsive Repairs Representative must provide written comments in the action plan with a deadline for conclusion of the action or discussion. The Tenancy officer will quality check the repairs action plan to ensure it includes all items identified at the inspection and raise any outstanding items with the Responsive Repairs Representative or Repairs Technical Manager.
Action: Responsive Repairs Representative; Tenancy officer
- 4.2 Within five working days, the Neighbourhood Caretaking Manager should provide the Tenancy Officer with a report with deadlines for inclusion in the Unified Action Plan (see 4.3) on any estate care or grounds maintenance issues arising from the inspection. Where issues cannot be progressed immediately pending other action (e.g. quotes), further discussion or consultation, the Neighbourhood Caretaking Manager must

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provide a written report with a deadline for conclusion of the action, discussion or consultation.

Action: **Neighbourhood Caretaking Manager**

- 4.3 The Tenancy Officer should produce a Tenancy Action Plan (Appendix 4) detailing items other than repairs or estate care identified at the estate inspection. The Tenancy Officer sends the Tenancy Action Plan together with the Repairs Action Plan and Neighbourhood Services Action Plan to the Resident Representatives, Ward Members and Neighbourhood Caretakers who attended the estate inspection within 15 days. These 3 elements together comprise the Unified Action Plan. The action plans are also to be saved in the electronic file accessible to resident representatives and scrutiny team.

Action: **Tenancy Officer**

- 4.4 The Tenancy Officer to update the details in the Appendix 5 spreadsheet contemporaneously.

Action: **Tenancy Officer**

- 4.5 Tenancy Officer files all documents connected with the estate inspection in the central electronic files including those open to resident scrutiny i.e. invite letters and emails, Checklist, Tenancy Action Plan, Caretaking Manager's Action Plan, Repairs Action Plan, covering letters,

Action: **Tenancy Officer**

- 4.6 The dates for Progress Review Meetings are to be set in Advance when the estate inspections organised and noted on the spreadsheet.

Action: **Tenancy Officer**

- 4.7 The Tenancy Officer's role is to drive forward the process after the inspection

5. Following up Estate Inspections and Monitoring Progress

- 5.1 Senior Tenancy Officer to monitor delivery and quality of estate inspections via Casework Reviews with the tenancy officers using the estate inspection schedule, the Appendix 5 Spreadsheet and the central file of inspection reports as reference sources. Any areas of concern, including missed or postponed inspection should be highlighted for the Tenancy Manager.

Action: **Senior Tenancy Officer**

- 5.2 Repairs Officer to raise a pre-inspection appointment of an hour

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for a follow-up inspection to monitor progress of repairs ordered. This inspection should be no longer than seven weeks after the Estate Inspection.

Action: Responsive Repairs Representative

- 5.3 Neighbourhood Caretaking Manager to diarise an appointment for a follow-up inspection to monitor progress in resolving estate care and grounds maintenance issues identified. This re-inspection should be no longer than seven weeks after the Estate Inspection.

Action: Neighbourhood Caretaking Manager

- 5.4 Tenancy Officer diarises a follow-up inspection to monitor progress on any tenancy related issues identified. This should take place no later than 7 weeks after the Estate Inspection.

Action: Tenancy Officer

- 5.5 The Tenancy Officer to schedule and lead an hour long Progress Review Meeting with Responsive Repairs Representative and Neighbourhood Caretaking Manager 8 weeks after the Estate Inspection to monitor progress and agree any remedial action to ensure all issue have been resolved or progressed satisfactorily before the next Estate Inspection. One Resident Representative who attended the inspection should also be invited. Notes of the meeting are to be kept by the Tenancy officer using the form in Appendix 7, copied to the Tenancy Manager and placed on the central files with the other estate inspection records.

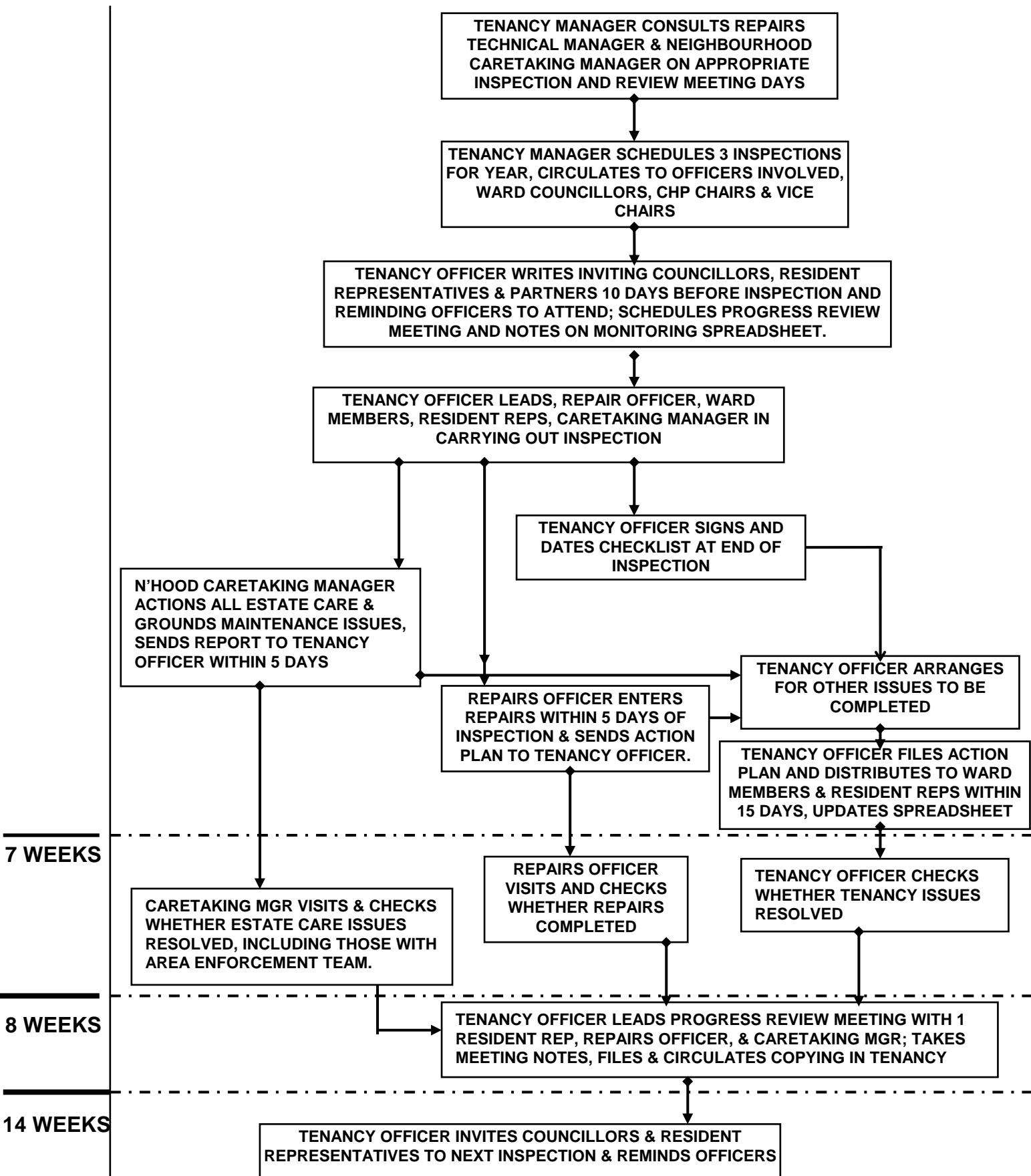
Action: Tenancy Officer

The objective of the estate inspection is to ensure health and safety issues as well as general upkeep of the estate issues are resolved wherever possible within eight weeks of the inspection.

See also Appendices 1-7 over page.

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APPENDIX 1



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ESTATE INSPECTION

APPENDIX 2

Estate(s) Inspected	Block or door Nos.	Block or Street Name	Ward

Date Of Inspection	
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Estate care & communal repairs: (tick to confirm these were checked on the inspection)	Checked ✓	Not checked X
Estate Cleaning by (Caretaker):		
External cleaning (by Viola):		
Grounds Maintenance: (e.g. grass cutting/edging, flower bed, trees & weed control)		
Paving or Potholes		
Repair: (Communal)		

ACTION REQUIRED:

1. Inspect the block/area ensuring that all relevant points on the attached "Checklist" are checked.
2. Tenancy Officer or Neighbourhood Caretaking Manager to record separate notes of non-repair action required. Repairs Officer to record all repairs required.

Tenancy Officer to sign and date checklist on site at the end of the inspection as a true record.

ESTATE INSPECTION: - CHECKLIST

Estate(s) Inspected	Block or Door Nos.	Block or Street Name	Ward

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Items	Inspected Yes/No/N/A	Items	Inspected Yes/No/N/A
Roof Access Secure		Drains And Gulleys Clear	
Tank Room Secure		Paving/Walkways/ Flooring (Check For Tripping Or Slipping Hazards)	
Elec Intakes Secure		Estate Roads	
Fire Doors/Exits		Grass Cutting, Trees, Flower Beds, Hedges	
Communal Lighting		Communal Door Entry System	
Communal Glazing & Window Frames		Abandoned Vehicles	
Dry Risers		Parking/Garage Areas	
Lightning Conductors		Sheds	
Dust Chute Hoppers		Graffiti	
Refuse Chutes Clear		Estate Signs	
Refuse Chamber Area		Play Areas	
Overflows & Leaks		Internal Communal Repairs	
Bulk Refuse Removal		External Communal Repairs (Such As Walls And Fences).	
Lifts Working		Sheltered scheme common rooms and communal facilities	
CCTV		Recycling facilities	

I certify this as a true record of an inspection completed today,

Tenancy Officer's signature:	Date:
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APPENDIX 3

Housing Office

CR
Tel/Typetalk: 020 8726 6100
Minicom: 020 8760 5797

Name
Address

Contact:
@croydon.gov.uk

Your ref:
Our ref: .
Date: 2012

Dear M

Estate Inspection on (day/date)..... 2012

I have pleasure inviting you to accompany my inspection of Council estates *in/on/at* the (*Define area/blocks/estate to be inspected*).

I have also invited the Ward Councillors to attend, a Repairs Officer, the Neighbourhood Caretaking Manager and, (...*number*...) other resident(s), and the following special invitees (...*specify*.....).

The inspection party will meet at (*Place*) ata.m. /p.m. (*time*).

I aim to complete the inspection in about 2 hours but it might take up to 3 hours depending on the itinerary and what we discover on the day. It will not be possible to continue the inspection for longer than 3 hours because officers attending have prior commitments beyond that time. Please therefore notify me in advance about anything you want me to prioritise during the inspection in case time runs short

The estate inspection covers the exterior and communal parts, facilities and grounds of the estate, including all shared entrances and stairways in blocks. Garage areas on the estate will also be inspected.

My role is to lead the inspection party and I will be responsible for ensuring that all issues identified at the inspection are progressed.

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I would ask that all members of the inspection party should stay together, listen to one another and treat each other with respect.

Where we come across items stored in communal areas or untidy gardens, I will follow these issues up later with the households concerned.

After the inspection, I will send within 15 working days a District Action Plan with target dates to those who attended. The action plan will include receipts for repairs ordered, details of estate care and grounds maintenance tasks to be undertaken, and details of tenancy management action to be carried out. Two months after the inspection, I will convene a Progress Review Meeting to appraise progress in meeting the action plan. I will invite all the officers and a resident who came on the estate inspection to attend the Progress Review Meeting.

Please let me know if you would like a copy of the full Estate Inspection Procedure.

I hope you will be able to attend the inspection and look forward to meeting you there.

Yours sincerely,

Tenancy Officer's name

Tenancy Officer (..... District)

ESTATE INSPECTION SPREADSHEET (to be filed in 'G' Comments)

Estate/block address	Scheduled inspection date	Actual inspection date	Scheduled times	Actual times	Officers and residents' representatives attending	Date Action Plan sent/filed	Date of review meeting
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(Estate Inspection Procedure.2012)

Estate Inspection – Repairs Action Plan

Estate/block address:

Date of inspection:

Location	Defect	Works order nos. or other action taken	Deadline	Comments

Signed: (Repairs Officer)

Date:

Estate Inspection: Record Of Progress Review Meeting (PRM)

(Appendix 7)

Estate Name:		Date Inspected:		Date of progress Review Meeting (2 months after inspection)		Next inspection date	
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Attendance at PRM:

Tenancy officer: (name)

Repair officer: (name)

Caretaking manager: (name)

Resident representative (name)

PRM meetings are chaired and record kept by tenancy officer.

Note: record only items from the inspection still unresolved or outstanding at the time of the progress review meeting.

Repairs issues outstanding or unresolved				
Location	Details/description	Reason for non-completion	Remedial action needed before next inspection	Action by
Estate care issues				

outstanding or unresolved				
Location	Details/description	Reason for non-completion	Remedial action needed before next inspection	Action by
Tenancy issues outstanding or unresolved				
Location	Details/description	Reason for non-completion	Remedial action needed before next inspection	Action by

Tenancy Officer Signature:		Date Distributed (5 days of meeting)	
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