



Group Estate Management Policy

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Last reviewed – month/year: September 2026

Version: 2.0

Approval body	Caledonia Management Board Cordale Management Committee
Date of approval	September 2026
Date of next policy review	October 2029
Customer engagement required	No
Your Voice engagement required	No
Equality Impact Initial Assessment completed	Yes
Full Equality Impact Assessment required	Yes / No
Data Protection Risks Assessed	N/A
Health and Safety Risks Assessed	Yes
Sustainability Impacts Assessed	Yes
Procedures Updated	Yes
Date Procedures Last Reviewed	August 2026
Data Impacts / IT System Changes Assessed	Yes
Training Needs Assessed	Yes
Previous Policy Version	2020 version 1.0
New Policy Version	September 2026 Version 2.0

Equality Impact ~ Initial Assessment

1. People responsible for carrying out this assessment	
Policy Owner:	Executive Director of Operations
EQIA Assessor(s):	Regional Manager (Area 2), Governance Officer
Name of Policy:	Group Estate Management Policy
Date of last EQIA:	
2. Purpose, aim(s) and expected outcomes (including who will benefit):	
This policy is an existing Group policy that has been reviewed as part of the Group's regular policy review cycle. The review has been undertaken to ensure the policy remains up to date, reflects current legislation, good practice and organisational arrangements, and continues to support effective estate management within our communities. The purpose of this policy is to protect the interest of tenants, the wider community and the Group. It demonstrates our commitment to looking after our local environment and creating sustainable, desirable neighbourhoods and communities through effective estate management. The policy sets out how we will address specific issues that we know are important to tenants and residents. We are committed to taking a proactive approach to preventing problems where this is possible and responding quickly and effectively when issues arise. The primary beneficiaries of this policy are tenants and other service users. Secondary beneficiaries include the wider neighbourhood, environment and the communities in which we operate.	
3. Is there a direct impact on people, or how the service is delivered?	
The Group Estate Management Policy applies to all properties and land owned by the Group, including properties managed by the Group as Factor. The policy also applies to all tenants and service users and provides assurance that the environment and matters of health and safety and community safety are managed effectively to deliver sustainable communities for all. The Group operates in diverse neighbourhoods with a diverse tenant and resident population. As such, our estate management services are relied upon and valued by different people in different ways. The policy provisions are designed to provide assurance about general community safety, whilst recognising that various factors relating to an individual's circumstances and characteristics can impact their perception of safety and wellbeing. The policy includes a range of measures intended to support residents and improve neighbourhoods, including consideration of disabled parking bays, the assessment of requests for mobility scooters, the prompt removal of hate-related or discriminatory graffiti, and the maintenance of shared open spaces.	
4. Potential impact on diverse communities, customers or groups?	
The policy has been developed to support all tenants and residents and is expected to have an overall positive impact on the communities we serve. While some provisions may affect individuals differently depending on their circumstances or protected	

characteristics, no material adverse impacts have been identified. The policy includes measures to support equality, accessibility and community wellbeing.

5. Is there a Positive or Negative impact?

Positive	☒	Which groups does it impact?	The policy is expected to have a positive impact on tenants, residents and communities by supporting safe, well-maintained and sustainable neighbourhoods. No material adverse impacts have been identified for people with protected characteristics or other groups.
Negative	☐		
Neutral	☐		

6. Details of any engagement activities carried out

Internal consultation has taken place across teams helping to inform the provisions of this policy. In addition, the Association must meet legislative requirements. The Group Estate Management Policy meets with legislative and good practice requirements including The Scottish Secure Tenancy Agreement (SST). The Scottish Government, through the Social Housing Charter, sets out the outcomes it expects Housing Associations to achieve for its residents. In terms of how Associations manage their estates and neighbourhoods. The Charter states that social landlords, working in partnership with other agencies, help to ensure that Tenants and other customers live in well-maintained neighbourhoods where they feel safe.

7. Overall Impact Rating

Material impact ☐ Non-material impact ☒

8. Initial Assessment Findings and Recommendation

Initial Assessment Only ☒ Full EQIA Required ☐

9. Reason(s) for Recommendation

The policy is designed to have a positive impact on tenants, residents and communities by promoting safe, clean and well-maintained neighbourhoods whilst ensuring the Group's legal obligations, duties, and responsibilities as a social landlord are met.

While some provisions may have the potential to affect certain groups differently, particularly disabled residents and those who rely on mobility aids, the policy provides for individual consideration and reasonable adjustments where this appropriate. No material adverse impacts have been identified and a full EQIA is not considered necessary at this time.

Date of Initial Assessment 4 August 2026

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1.0 Introduction, Purpose and Scope of Policy

1.1 Caledonia and Cordale Housing Associations (**The Group**) recognises that Estate Management is a vital part of the environmental management role of the landlord and an important service for tenants and other residents. This Group Estate Management Policy demonstrates our commitment to tenants, and others whom we provide services to, that looking after our local environment is important in order to create and sustain desirable neighbourhoods.

1.1.1 Our local environment has a major impact on the quality of residents' lives, and the enjoyment residents take from living safely in their own homes. This policy aims to show how we work with tenants and owners as partners to maintain and improve the properties and environments we manage, including landscapes and common areas to the very highest standards.

1.1.2 The policy addresses specific issues that we know are important to tenants and residents, like graffiti, litter, vandalism and other crime. Working with the police and public service partners, we are committed to taking preventive action and to acting quickly and effectively when problems happen.

1.1.3 The Group are committed to achieving this outcome and to fulfilling our vision of *"homes and communities that make lives better"*.

1.2 Estate management refers to the management of our neighbourhoods, properties, the surrounding areas and related services. This includes properties we own, and properties where there is a management arrangement in place. The aim is to enable our tenants and residents to enjoy their homes in peace and live in a safe, secure and pleasant environment.

1.2.1 The Group Estate Management Policy applies to all properties owned by the Group or managed by the Group as Factor.

2.0 Principles, Aims and Objectives

2.1 The aims of the Group Estate management Policy is to ensure that:

- Tenants and factored owners live in well managed and maintained estates providing a decent, secure, safe, clean and tidy environment.
- Tenants and factored owners are made aware of, and accept, their responsibilities in relation to the upkeep of their property and surrounding environment.
- Tenants and factored owners are made aware of the Group's responsibilities in relation to estate management.
- Tenants and factored owners are satisfied with the Estate Management service provided by the Group.
- We provide opportunities for tenants and factored owners to feedback their satisfaction levels in order to influence and participate in decision making relating to estate management.
- The upkeep of the housing stock and surrounding environment are managed

and maintained to a standard which reduces the duration and level of void properties.

2.2 To achieve the above objectives the Group will;

- Work closely with tenants and factored owners, regarding the quality of estate management services provided.
- Closely monitor the performance of contractors and the Estates Services regarding the upkeep of all common areas.
- Carry out suitable surveys on the quality of all estate management services.
- Encourage tenants and factored owners to contribute to estate management by participating in estate inspections or specific location inspections.
- Involve tenants and factored owners in developing initiatives for the improvement of their local environment and amenities.
- Keep tenants and factored owners informed about activities affecting their environment.
- Provide good quality information and advice on estate management services, including at the tenancy sign-up stage, new tenant visits, office enquiries, information leaflets, newsletter articles and customer service standards.
- Carry out regular inspections of our neighbourhoods and common areas including property inspections.
- Make effective use of internal recording systems including IT systems, email and standard pro-formas.
- Ensure staff maintain a visible presence throughout the Groups neighbourhood.
- Be proactive and take appropriate and early action to enforce tenancy conditions or title deeds where applicable.
- Work closely with other agencies and statutory bodies with the aim of ensuring that the Group's neighbourhoods and surrounding environment are well looked after.
- Ensure good relationships are developed with tenants, and factored owners to encourage and promote interest and involvement within their area for the mutual benefit of both the Group and the local community.
- Encourage feedback on services and publish findings from surveys and visits.

2.3 Legislative and Regulatory Context

The Group Estate Management Policy meets with legislative and good practice requirements including:

2.3.1 The Scottish Secure Tenancy Agreement (SST)

The Group can exercise direct control over its tenants via the terms of the SST and the tenancy conditions. The purpose of this is to protect the interest of tenants, the wider community and the Group.

2.3.2 The Scottish Social Housing Charter

The Scottish Government, through the Social Housing Charter, sets out the outcomes it expects Housing Associations to achieve for its residents. In terms of how Associations manage their estates and neighbourhoods. The Charter states that:

Outcome 6: Estate management, anti-social behaviour, neighbour nuisance and tenancy disputes

'Social landlords, working in partnership with other agencies, help to ensure as far as is reasonably possible that:

- Tenants and other customers live in well-maintained neighbourhoods where they feel safe.'*

2.3.3 The Group Estate Management policy supports the strategic requirements of the Group's Business Plan and links to the Group's Tenant Engagement Strategy, Void Management Policy, Anti-Social Behaviour Policy, Asset Management Strategy, Equality Diversity and Inclusion Policy and Risk Management Strategy.

3.0 Definitions

3.1 Key Terms

Estate management is the daily operation, care, and long-term planning for physical property and land.

4.0 Policy Statements

4.1 The following policy statements provide guidance for staff and information for residents as to the Groups commitments. To ensure that the Group delivers on the Estate Management Policy's aims and objectives and for absolute clarity in terms of service delivery the following policy statements will apply:

- Provision of quality information and advice;**
The Group will provide information to tenants and factored owners the estate management services they can expect via the Tenancy agreement or service agreement. We will publish articles in the Groups newsletters, placing information on our website and through face-to-face contact with residents at tenancy sign-ups, new tenant home visits, office interviews and other communication requiring follow-up action following estate inspections.
- House inspections:**
The Neighbourhood Housing Officers and Maintenance Inspectors will undertake house inspections in response to reports that the tenancy conditions are not being maintained. The Officers will also observe compliance with the tenancy conditions when undertaking ad hoc visits to houses.

- **Close meetings and resident meetings:**

The Neighbourhood Housing Officers and appropriate staff will organise close meetings or resident meetings as required to address any estate management concerns which may arise and where a meeting is helpful and practical. The Neighbourhood Housing Officers and other relevant staff will attend the meetings as required. The Group may invite partner agencies which are relevant to the issues in hand in order to provide a joined up approach to solutions.

- **Estate inspections:**

The Neighbourhood Housing Officer will organise and attend pre-arranged estate inspections in line with any arrangements and timescales which are in place. Staff will arrange estate and property inspections of factored properties. Residents will be advised in advance and will be invited to participate in the inspection when appropriate and reasonable to do so. Issues arising and actions required will be recorded.

The Neighbourhood Housing Officers and Maintenance Inspectors will be in the neighbourhood on a regular basis whilst undertaking home visits for tenancy matters, repair inspections, tenant meetings, tenant interviews and planned estate inspections.

- **Monitoring Standards:**

Where services are in place for the cleaning of communal areas, windows, communal landscape maintenance and the general environment, staff will monitor the terms of the contract and the quality of the service provided. The Neighbourhood Housing Officers will regularly inspect these areas to ensure that services are being provided as planned and are satisfactory. The Neighbourhood Housing Officers will take responsibility for taking forward actions to resolve concerns about performance or poor standards.

- **Upkeep of gardens areas:**

Residents who have gardens are responsible for maintaining them and keeping them tidy. The Neighbourhood Housing Officer will ensure that tenancy conditions are maintained, and that agreed action required to resolve issues is taken promptly. On occasions where it is proving difficult for a tenant to meet their responsibilities regarding their requirements to cut their grass and staff have intervened unsuccessfully, the Group may instruct contractors to cut the grass, and the subsequent costs will be re-charged to the tenant.

- **Keeping pets:**

Tenants who wish to keep pets need to request permission to do so. In addition to permissions, tenants must adhere to the terms and conditions of their tenancy agreement for the keeping of, and control of pets. The Group will address

dog fouling by working with residents, the local authority and the use of marketing tools.

- **Car parking:**

Where car parking is provided by the Group, this is available to our residents on a “first come, first served” basis. The Group will consider the provision of a courtesy parking bay for use by disabled badge holders provided that the request is made in writing and that there is sufficient space for the bay and other parking. This only applies where the Group own the land, other requests should be directed to the Local Authority.

Where roads have been adopted by the Local Authority, the Local Authority and Police Scotland will have the responsibility for implementing any parking restrictions or road traffic legislation and management. Local Authorities will also be responsible for the repairs and maintenance of these adopted roads. Where the Group own the land on which roads or parking is located, the Group will retain management responsibility in line with the conditions set out in tenancy agreements or deeds.

- **Abandoned vehicles and Inappropriately Parked Vehicles:**

The Neighbourhood Housing Officer will investigate reports of any abandoned or inappropriately parked vehicle on the Groups property or land. Steps will be taken to identify and contact the owner of the vehicle and request its removal. The abandoned vehicle will be reported to the Local Authority abandoned vehicle team who will put into action their procedures for identification and removal. Such vehicles include motorized vehicles, caravans, boats, trailers and similar.

- **Vermin and other infestations:**

Where vermin or infestation is reported and found in Association owned common areas, the Neighbourhood Housing Officer or Maintenance Inspector will arrange appropriate contractors to undertake remedial works. Where vermin or other infestations have been identified within our properties and impacting on the wellbeing of the tenant or causing or likely to cause damage to the property the association will instruct suitable works to eradicate the problem.

All other pest or vermin control remains the responsibility of the tenant. The Neighbourhood Officer will take responsibility for addressing any underlying issues linked to a tenant’s living conditions or lifestyle that may be contributing to the infestation. This may involve other agencies (social work, GP, etc.) and actions to ensure compliance with the tenancy conditions. Where the source of the infestation is related to a non-tenant, the Group will liaise with the local environmental health team.

- **Feeding birds:**

Residents should only feed birds using appropriate bird seed feeders or tables; ground feeding will not be permitted. The Neighbourhood Housing Officer will investigate reports of noncompliance with the tenancy conditions.

- **Condition of bin store areas:**

Residents are responsible for ensuring that their bin store areas are kept clean and tidy and free from any refuse or other items. The Group may arrange for bin store areas to be swept and washed down to keep them clean and safe, where this has been agreed with residents. The Neighbourhood Housing Officer will regularly check the condition of the bin stores and will investigate reports of non-compliance with the tenancy conditions.

- **Dealing with dumping of large items:**

Where large items (furniture, boxes, white goods etc.) are left in or near bin stores, in communal areas or in stairwells the Neighbourhood Housing Officer will investigate and seek to identify the household responsible and secure removal under the terms of the tenancy conditions. The items will be removed if ownership cannot be identified and a charge will be applied proportionately to the block management costs. The Group's priority under these circumstances will be to ensure that bin stores, communal areas and stairwells are kept safe and free from fire hazards.

- **Dealing with graffiti:**

The Neighbourhood Officer will arrange for graffiti on walls, doors and other communal areas to be removed. Graffiti that is hate-related, discriminatory, offensive or abusive will be prioritised for removal as quickly as possible.

- **Hazardous materials:**

The Neighbourhood Housing Officer will arrange for a suitable contractor to remove any hazardous items, such as used syringes and needles or any other type of dangerous material. The Neighbourhood Housing Officer will take responsibility for resolving an issue directly attributable to a tenant's living conditions or habits. This may involve other agencies (social work, GP, etc.) and actions to ensure compliance with the tenancy conditions.

- **Mobility scooter, medical scooter, or other power-operated vehicle (POV) and buggies:**

The Group will consider requests to keep a mobility scooter, medical scooter or other powered mobility device. Permission must be obtained in advance. Requests will be assessed on an individual basis, taking account of the resident's needs, the suitability of the property, fire and building safety requirements, and any available storage arrangements.

Mobility scooters and similar vehicles must not be stored in communal areas

that have not designated for storage, as this may create health and safety and fire risks.

Where insurance is required as a condition of approval, residents will be asked to provide evidence of current cover annually.

The Neighbourhood Housing Officer is responsible for considering requests and ensuring decisions are made fairly, reasonably and in accordance with the Group's policies.

The Group will not permit the storage of scooters or buggies in communal areas or stairwells that are not designed or designated for such storage as this is a health and safety risk for all.

The Neighbourhood Housing Officer is responsible for considering requests to store a scooter or buggy and for investigating issues of where the above requirements have not been met.

- **E-Bikes and E- Scooters:**

E-bikes and E-scooters should not be stored or charged in communal areas, including shared pathways or stairwells, landings, entrances or other areas used for access or emergency escape.

- **Involving other agencies:**

Where the Group cannot solve or is not responsible for solving an estate management issue, the Neighbourhood Housing Officers and other relevant staff will liaise with, and request assistance from, other agencies, such as environmental health, the Police, social work and local councils. The Group will remain proactive in working to improve the conditions on its estates and in its neighbourhoods.

- **Children's Play and Recreation areas:**

The Group have a number of play and recreation areas within our neighbourhoods for the benefit and wellbeing of our communities. The Group will insure, maintain and inspect these areas regularly and take the appropriate action to address any issues which arise.

- **Operations Estate Management budget:**

The Group provides an annual estate management budget which is devolved to the Area Team Leaders. The fund is to be used to provide improvements to estates and communal areas following suggestions from residents during the annual estate inspection or other ad hoc visits. The aim of the budget is to provide small scale improvements that will help the general outlook or use of an area (i.e. provision of benches, hanging baskets, paths, signs, etc.).

5.0 Roles and Responsibilities

All Group staff have a shared responsibility for looking after the Group's neighbourhood and properties by reporting anything they see which causes concern. Neighbourhood Housing Officers will be primarily responsible for responding to and dealing with estate management matters, however, other staff will support this policy objective throughout the course of their work by highlighting any matters of concern they identify. Other staff include Maintenance Inspectors, Asset Officers, Scheme Managers; Estate Caretakers; Customer Solutions Assistants.

Responsibility for contractor compliance, monitoring, and assurance in relation to grounds maintenance services sits with the Association's Compliance Team. This activity will be undertaken primarily by Compliance Officers, with specialist support from external consultants engaged where appropriate. The Compliance Team will provide assurance that contractors are operating in accordance with contractual requirements and relevant regulatory, legislative, and policy obligations.

Operational management and performance monitoring of grounds maintenance services will be led by Area Leaders and Neighbourhood Officers, supported by other colleagues involved in estate management. This includes overseeing service delivery, monitoring contractor performance against agreed standards, and addressing any issues impacting service quality or customer outcomes.

5.1 Monitoring and Enforcement

The Operations department will have the key responsibilities for monitoring our estates and enforcing the provisions of this policy.

6.0 Procedures

The Group has corresponding procedures and good practice for the implementation of the policy provision.

7.0 Compliance and Enforcement

It is important that all members of staff, in carrying out their duties for the Group, do so in accordance with the Group's policy framework. Our policy framework ensures we comply with laws and regulation, while giving guidance to inform operations and decision-making. Our policies have been designed to be clear and easy to understand and are available on our website and intranet. If any member of staff is unclear as to their responsibilities under this policy, then they should refer to their line manager and / or the policy author for further guidance. A failure to comply with Group policies can have serious consequences for the Group. Should an employee become concerned about serious non-compliance with the policy, they should speak to their line manager or refer to the guidance set out in the Group Whistleblowing policy.



8.0 Review and Revision

8.1 Review Frequency

This policy will be reviewed every three years or sooner if legislation or operational needs change.

8.2 Responsibility for Updates

This policy will be reviewed by The Regional Manager or equivalent grade from the date it is approved by the Board of Management.

9.0 Approval and Effective Date

9.1 Approval Details

September 2026 by Board of Management and Cordale Management Committee.

9.2 Effective Date

This policy takes effect September 2026.