

# Mobilisation of New Build Properties

Our approach to mobilisation of new build developments

Warwick Estates will prepare a comprehensive mobilisation plan on appointment however the list below sets out some of our main priorities for the mobilisation of the management set up. One of the most pressing is to create a clear property management strategy and ensure service charge budgets are available to present to prospective purchasers.

During this phase, prospective owners and occupiers will need to be satisfied that their home will be competently managed in order that they can live comfortably and/or operate their business efficiently and that the cost allocation is clear and reasonable.

Based upon our teams' experience, we view the following items as priority tasks to address in the period leading up to Practical Completion. Clearly this is not an exhaustive list and we would expect to agree the full scope of services with you on appointment.

- a. Review of lease structure and clauses.
- b. Draft and agree the Property Management Strategy
- c. Prepare indicative Year 1 draft Service Charge Budgets inclusive of Resident and Occupier presentation packs/notes.
- d. Draft Residents/Occupiers' Handbook and Financial Procedures Guide. This comprises management related information specific to the developments.
- e. If required, prepare the Community app to present documentation and community engagement to all residents. Populate the app with local information and make this available as soon as possible to support your marketing team.
- f. Prepare 'Welcome Pack'. These contain development specific information and will be given to everyone on their first day of occupation if not before.
- g. Back up information for appointed sales/letting agents.
- h. Presentations to and/or discussions with potential Residents.
- i. Agree Transition Strategy.
- j. Draft and Agree Emergency Procedures.
- k. Prepare Start Up Cost Schedule e.g. management equipment.
- l. Where required, prepare Void Schedules.
- m. Recruiting and employing on site team members where required.
- n. Prepare specifications for Cleaning, Security, Pest Control, M&E Maintenance contracts etc, tender and appoint when necessary.
- o. Attending training courses on specialised equipment etc.
- p. Meet and establish relationship with local stakeholders.

In addition, we will be happy to provide input into the various stages of design, attending meetings, and ensure that technical advice is available to mobile and provide a robust management regime.

Being able to prepare for occupation well in advance will enable us to ensure all on-site legislative signage and procedures (lone working, permits etc.) are reviewed and updated in accordance with the risk assessments and implemented as soon as a reasonably practicable.

Prior to handover of any block, partial block, or entire estate, we would expect to be provided the following for review:

- The history of the development  
(year of construction, building regulations, planning, key consultants)
- O&M Manuals
- Health and Safety File  
(including design residual risk register)
- Strategy documents  
(fire, phasing documentation, refuse etc.)
- Building Control
- Asset Register
- Commissioning certificates
- Riser schedule
- As built drawings, utility schematics and key register
- Details of any warranties and maintenance contracts in place

---

Following review of the documentation your team of property management professionals will undertake a health and safety review of the area(s) to be handed over. This will include reviewing and assessing any residual risks on the design risk register, and ensuring the areas are safe to handover. Following the review, all parties will formalise the handover.

**Note:** *We would expect that for Phased Occupations, a formal approval will be required by the Building Control Authority in the form of a letter or certificate, confirming that they approve the phased occupation strategy and for the building to be occupied in the manner set out, ahead of first occupation.*

---

We will produce site specific management plans in advance of occupation (such as Fire Management Plans and Estate Operative Safe Systems of Work) and ensuring the staff have the required familiarisation and training for the plant and equipment that has been handed over. We will create train the trainer videos, where we will video the M&E contractor explaining the plant or equipment, commissioning, what is included under the warranty and how to maintain. We will use this video to form a part of the team onboarding and training process.

Warwick will also undertake a detailed review of the O&M's/asset register against the leases to produce a roles and responsibilities matrix for the Client and Customer. This will determine who the responsibility lies with (as per the lease) and the intervals of inspection and how to maintain (as per the O&Ms).

This assessment will assist with the communications required for the Home Manuals. As an example, leaseholders may be responsible for inspection and maintenance of doors (including hardware) and glazing including balcony and front doors. Warwick can then send reminders and communicate this requirement to the customers.

Taking our teams experience from working with build teams, we have developed a detailed mobilisation checklist. This checklist will ensure the suitability of the systems being handed over and define any issues and/or defect responsibilities at the point of handover. An example of our handover form is shown below:

No	Issue	Item Satisfactory?			Was system tested / demonstrated at handover			Comment	
		N/A	Yes	No	N/A	Yes	No		
Life Safety Systems									
1	Fire Alarm System	Commissioning Sheets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		Operation & Maintenance manual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		Telephone line and auto dialler connected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2	AOV's	Test and commissioning certs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3	Fire - Responsible Person	Has a responsible person been formally appointed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4	Building Control	Witnessed Fire Management System and signed off	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5	Mechanical & Consultant	Witness Fire Management System and signed off	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6	Fire Consultant Review	Fire Management Strategy in place and adequate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		Fire Management Plan in place and adequate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		All paperwork reviewed and in accordance with legal requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		Cause and effect testing carried out	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		Review of Fire Doors against the strategy and review of functionality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		Visual inspection of Fire Stopping and review of Fire stopping register	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Being able to prepare for handover well in advance, reviewing the documentation and adopting the handover checklist, will ensure the areas that are being handed over are defined, and are controlled adequately.

We are committed to working with our Developer clients to ensure the smooth transition of properties into management and ensuring continuation of the customer journey. We achieve this by working closely with our clients to define clear expectations during the mobilisation phase, utilising our team's extensive skills to ensure client and customer satisfaction.

Pre-completion mobilisation work-streams are outside our standard management function and are chargeable to our Clients.