Property Investment Policy

Regulation and Legislation	This policy is linked to: The Leasehold Reform, Housing and Urban Development Act 1993. The Landlord and Tenant Act 1985. The Commonhold and Leasehold Reform Act 2002. The Regulatory Reform (Fire Safety) Order 2005. The Housing Act 2004. The Health and Safety at Work Act 1974. The Management of Health and Safety at Work Regulations 1999. The Environmental Protection Act 1990. RICS Code of Practice. ARHM Code of Practice. The Regulator of Social Housing Consumer Standards. The Home Standard of the Regulatory framework for social housing in England (from April 2012) Building Regulations 2010 Construction (design and management) Regulations 2015 Building Safety Act 2022
Supporting documents	Asset Management Strategy, Procurement Policy, Group Standing Orders
Scope	This policy covers: • **Strategic Programme management**: The delivery of installation and improvement programmes and special projects allocated to the Property Improvement Team by the Strategic Asset Team inclusive of a corresponding budget aligned to the Programme set. • **Operational delivery.** The contract documentation, the monitoring and supervision of works, management of quality, health and safety, payment of contractors, control of budgets and measurement and delivery of core KPIs. • **Procurement**: To the extent that the Property Improvement Team will liaise with and support the Procurement Team in the tendering and re-procurement of programmes delivered by the Property Improvement Team. This policy does not include: - • Servicing of existing equipment. • Formulation of programmes i.e., the selection of properties for inclusion in PI programmes. • Minor improvement works carried out reactively or at void stage.
Reference to “Orbit” means Orbit Group which consists of Orbit Group Limited, Orbit Housing Association Limited, Orbit Homes (2020) Limited, Orbit Treasury Limited and Orbit Capital Plc.	

1. Introduction

1.1 This policy has been developed to set out how Investment & Cyclical works programmes will be delivered. It also reflects our customer promise and our business plan objectives of:

- continuously improving the quality of our homes by investing in our own stock and customer service.
- ensuring that our properties are maintained, energy-efficient, customer safe, and considered good quality homes by our customers.
- offering excellent customer service by listening to our customers through consultations and surveys to shape our future programmes.

2. Definition

The Property Improvement Team delivers large scale programmes of work as prescribed by Strategic Asset Management and the Property Safety Team through agreed programmes and approved budgets.

3. Regulatory Code and Legal Framework

3.1 Orbit will carry out planned maintenance and component replacement in line with legal and statutory obligations, to improve the quality of our properties and estates and to safeguard the health and safety of customers, contractors, and colleagues. These obligations include:

3.2 The Safety and Quality Standard of the Regulatory framework for social housing in England (from April 2024) which requires Registered Providers:

- to provide an effective, efficient and timely repairs, maintenance and planned improvements service for the homes and communal areas for which they are responsible.
- to ensure that tenants' homes meet the standard set out in section five of the Government's Decent Homes Guidance and continue to maintain their homes to at least this standard unless exempted by the regulator.

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3.3 The Leasehold Reform, Housing and Urban Development Act 1993 which requires Orbit to carry out certain works on behalf of tenants, in accordance with regulations set by the Secretary of State.

3.4 Orbit's responsibility under section 11 of the Landlord and Tenant Act 1985 for maintaining the structure and exterior of our properties (including drains, gutters and external pipes) and installations in the property for the supply of water, gas and electricity; and for sanitation (including basins, sinks, baths and sanitary conveniences).

3.5 Orbit is required to consult with leaseholders (including shared owners) prior to entering into Qualifying Long-Term Agreements and prior to undertaking Qualifying works, in accordance with Section 20 of the Landlord and Tenant Act 1985 as amended by the Common hold and Leasehold Reform Act 2002.

4. Policy Statement

4.1 We will deliver programmes covering all aspects of the service including our aim to

- Support our Customer Promise and business plan objectives to provide cost effective works.
- Deliver high levels of customer satisfaction, through customer engagement and continuous improvement of our contractor activities.
- Implement best practice principles to bring efficiencies and improve standards of delivery, by monitoring industry trends.
- Enter into consultation with customers to offer a customer choice where appropriate, both within the planning of individual works (such as kitchen and bathroom refurbishments) and when amending policy, procedure and process.
- Work within Orbit's 'No Access policy' to maximise the completion of works, whilst respecting the individual choices of customers.
- Support customers to allow works to be carried out and where possible offer alternative timescales.
- Consult customer before making material changes to this policy.

4.2 Health and Safety

We will:

- Adhere to the expectations of the Construction (design and management) Regulations 2015 ensuring that all required programmes have a Contract Phase Plan, Health & Safety File and F10 where appropriate.
- Monitor a proportion of works undertaken to ensure contractors and sub-contractors conform to the CDM process and that this is evidenced in accordance with the latest Health and Safety regulations.
- Record and report on these H&S Audits by using Orbit's SHE database and use the detail provided within Contractor Operation Meetings so that learning and best practices are adopted.
- Put the safety of our customers, colleagues, and contractors first and ensure safe working practices are followed at all times by all parties.
- For the avoidance of doubt, all Health and safety processes, procedures and agreed practices will apply equally to both the main contractor and any sub-contractors engaged by our main contractors in accordance with agreed contract terms.

4.3 Compliance

We will:

- Meet all statutory, regulatory requirements by abiding to the Property Safety Team's Policies and Procedures and Orbit's approach and management of Health and Safety in general.

- Provide all control documentation as determined by Orbit's Strategic Asset Team ensuring that no invoices are paid until such documentation has been received and verified as acceptable.

4.4 Performance criteria and targets for all programmes

We will:

- Develop targets in line with those set by Orbit's Property Operations Department and that are used to report performance on a monthly and annual cycle.
- Plan and implement the delivery of programmes within budget and financial periods and aim to avoid or contain slippage.
- Aim to achieve and improve upon Customer Satisfaction targets as set by the business and within individual programmes.
- Monitor the performance of each region and the team in general and report monthly to Property Operations Senior Management Team.

4.5 Monitor activity and outcomes

We will:

- Monitor each contract using customer feedback, data analysis, inspections, or any other relevant source. We will resolve issues with contracts as they occur and will address major or recurring issues in regular operational Meetings.
- Audit a sample of all programmes based upon factors such as cost and performance and record and report on these Quality Audits.
- Regularly report progress to the Property Operation's Senior Management Team.

4.6 Programming of cyclical and improvement works

We will:

- In liaison with our term contractors implement any processes or improvements that delivers efficiency and quality of service within overall value for money objectives.
- Work with our Strategic Asset Team to support the delivery of longer term three-, four- or five-year programmes that allow better planning and more efficient procurement models.

4.7 Procurement

We will:

- Work with Orbit's Procurement Team so programmes are re-tendered in a timely manner and that this process delivers value for money for Orbit both from a financial and a qualitative perspective whilst ensuring contractors employed by Orbit meet all the regulatory and safety standards set internally by Orbit and legislative requirements.

4.8 Audit

We will:

- Use ActiveH for the raising and reporting of all programme delivery thereby ensuring that most of the required information for the audit of the service is easily reportable.
- Hold additional Contractual data on defined network folders within the Property Services file structure.
- Ensure that financial data relating to budget management is available for audit purposes.

4.9 Customer Consultation

We will:

- Ensure residents are fully consulted.
- Where possible, residents will be given choices in respect of the works carried out to their properties.
- In cooperation with our contractors and partners, employ Resident Liaison Officers to ensure the consultation processes are carried out and to liaise with and advise residents on matters relating to the work being done.
- Our contractors will provide direct contact details to be used in the event of query, dispute, or dissatisfaction and in the event that satisfactory resolution is not achieved, customer may escalate to Orbit through existing complaints processes.

4.10 Leasehold Consultation

We will:

- Ensure compliance with Section 20 of the Landlord and Tenant Act 1985 and the requirements of the latest Commonhold and Leasehold Reform Act when consulting with leaseholders about work being carried out.
- Seek to recover the maximum amount due from leaseholders in line with lease terms.
- Consult widely with leaseholders using the vehicle of Long Term Qualifying Agreements.

4.11 Equality and Diversity

We will:

- Implement this policy in accordance with Orbit's Equality and Diversity Policy.
- Give particular consideration to vulnerable tenants where there is likelihood that the work has not been undertaken due to a customer's medical condition, general wellbeing or involves situations of domestic abuse or harassment.
- Be sensitive to the specific needs of older tenants, those with a disability or client groups living in supported housing accommodation with extensive vulnerabilities.

We will seek to ensure such circumstances are considered when applying this Policy whilst always being mindful of the risks associated with compliance.

- Work in accordance with Orbits revised No Access Policy to ensure that the specific needs of vulnerable customers and met and considered when attempting to access properties to complete work.
- Work with our contractors to fully meet the requirements of Orbit's Safeguarding policy and ensure that all concerns are followed-up.
- Provide regular contractor safeguarding refresher training.

5 Data retention

5.1 We will

- Ensure that any personal data on customers relevant to each completed programme and held by Orbit external to ActiveH will be deleted at each year-end.
- Ensure that a similar instruction is issued to programme contractors who will need to confirm adherence.
- Retain programme details and records associated with project management and the completed work.

6. Roles and Responsibilities

Role	Responsibility
Policy	Head Of Service
Performance Management	Head Of Service
Contract Management (Strategic)	Property Improvement Manager
Contract Management (Operational)	Regional Programme Manager(s)
Programme Audits – H&S and Quality	Programme Managers and Project Managers
Data Retention	Project Co-Ordinators

7. Performance Controls and Business Risk

7.1 Compliance with this policy will be monitored by the Property Improvement Team.

7.2 The effectiveness of this policy will be monitored under the following Outcomes / Measurements:

Outcome	Measurement
Budgetary Delivery	Programme Budget; Monthly Accounts; Quarterly Reforecasts
Programme Delivery	Programme Targets; Monthly Performance data; Quarterly Reforecasts

Outcome	Measurement
Quality Delivery	Regular Quality Audits that are reported within Operational Meetings
H&S Performance	Regular Health & Safety audits that are reported within Operational Meetings
Customer Satisfaction	Customer Satisfaction and Real Time feedback

7.3 Performance in the delivery of the service will be assessed by regular monitoring as outlined above and through regular reporting to Property Operations SMT (POSMT) and Customer & Communities Leadership Team (CCLT).

7.4 Performance will be shared through reporting to POSMT and CCLT.

7.5 Orbit will carry out a fundamental review of this policy every three years subject to legal, regulatory changes or in accordance with the agreed Policy Review programme.

8. Essential information

8.1 All Orbit policies and procedures are developed in line with our approach to the following, data protection statement, equality diversity and inclusion (EDI) approach, complaints policy and our regulatory and legal obligations to ensure we deliver services in a lawful manner and treat people equally and fairly. Details of these are found on the declaration document for strategy policy and procedure summary and have been an integral part of the formulation of this document. Orbit's privacy policy can be accessed on our website www.orbitcustomerhub.org.uk/publications/policies/

EA	Equality Analysis was completed or reviewed in October 2022 and is available to view.
DPIA	A DPIA was approved in October 2022 and is available to view.
Consultation	**Internal:**
	External: Customers
Applies to	Property Improvement Team

Document control

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Directorate Customer and Communities

		Date
Approved by	Director of Property Operations	November 2023
Next review		Qtr 4 2026/27

Extension date	Extension reason	Approved by

Revision History

Version Number	Date	Comments / Reason for revision
V1.1	01/11/22	Inclusion of customer feedback changes
V1.2	29/09/23	Inclusion of Building Safety Act and role/responsibility updates
V1.3	Nov 2023	Change Decent Home Standard to Safety and Quality Standard in section 3.2
V1.4	July 2026	Amended review date due to operational changes