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A member of the South African Facilities Management Association

A member of the National Association of Managing Agents

EstateServ is an owner managed company for residential estates and commercial property in Gauteng.

EstateServ aims to provide experienced, professional property managers while still being small enough to provide attention to the details and ensure the highest level of service. We work closely with Managing Agents to ensure the smooth running of the Estate and can assist in recommending a Managing Agent suited to your Estate.

EstateServ provides the following standard services to our various clients. These services depend on the unique requirements of each complex and can be negotiated separately.

Each estate is assigned a dedicated portfolio manager and Site manager who works closely with the trustees, managing agent, various service providers and residents to ensure that the body corporate is well run.

OVERVIEW OF SERVICES

→ **RESIDENT ADMINISTRATION**

- *Welcome Packs*
- *Resident Records*
- *Tenant Administration*
- *Resident and Tenant Access Control*
- *Complaints*
- *Dedicated Portfolio Manager & Office Support*
- *General Notices and Newsletters*

→ **RESIDENT SUPPORT**

- *Daily support*
- *After hours emergency line*
- *Tracked ticketing system*

→ **FACILITIES MANAGEMENT**

- *Site Inspection and Office Support*
- *Maintenance and projects*
- *Security and other on-site contractors*
- *Meter readings*

→ **SECRETARIAL SERVICE**

- *Compilation and distribution of*
 - *communication*
 - *minutes*
 - *agendas*

RESIDENT ADMINISTRATION

Welcome Packs

All new residents are issued with welcome packs that include:

- welcome letter
- conduct rules
- latest newsletter
- important contact numbers
- pet application form
- domestic worker registration form
- instructions on how to log a ticket (query)

Resident Records

EstateServ will maintain and keep updated a database of residents' details which include:

- resident contact details
- domestic worker applications as well as the issuing of domestic ID cards
- pet applications
- letters of complaint issued etc.

Resident and Tenant Access Control

We are familiar with most resident contact systems and will manage the loading of all up-to-date contact details onto these systems as well as all movements of residents in and out of the complex through movement control forms.

Resident access is done at a convenient time to residents: it is arranged either in the early morning or after office hours such that residents are not inconvenienced.

Complaints

EstateServ will facilitate letters on behalf of the Body Corporate to any resident, visitor, domestic or garden worker, contractor and employees of the Body Corporate reported to be in contravention of the complex Body Conduct rules e.g. noise complaints, illegal parking, laundry etc. This is done to ensure that the complex rules are upheld and to promote harmonious living in the complex and is done in conjunction with the Managing Agent such that records are clear.

EstateServ tracks complaints of each unit so that trustees are aware of which units are problem units and we will advise a way forward to trustees on how this can be managed.

Dedicated Portfolio Manager & Office Support

A dedicated Portfolio Manager will manage the resident administration, general queries from the estate and is appointed as the direct Trustee liaison. The portfolio manager will manage a rolling year strategy for the estate in line with the complex ten year plan and the annual budget to ensure that all projects and maintenance are completed.

The owner of EstateServ is actively involved in the supervision and management of all complexes.

General Notices and Newsletters

EstateServ will, on behalf of the Body Corporate when required, prepare and distribute newsletters and general notices to residents and owners.

The EstateServ newsletter is an interactive newsletter that is sent to all owners once per quarter that includes all relevant and current information regarding the complex.

RESIDENT SUPPORT

EstateServ has a ticket logging system that is used for all queries, requests and complaints from residents. If a resident calls or emails EstateServ the query is logged by the administrator; alternatively, residents can log a query themselves on the EstateServ website.

These queries get logged in a ticket management system. This management system allows trustees, the Body Corporate and the Managing Agent, if needed, to assess the turnaround time of EstateServ in resolving queries.

Further, the ticket logging management system allows for EstateServ to advise trustees and the body corporate on:

- repetitive maintenance problems such that this can be rectified
- repetitive security issues such that this can be addressed
- number of tickets that are re-opened (ie have not been resolved correctly)
- satisfaction of residents with the service of EstateServ

The ticket logging system allows for quick and easy reporting of issues, submission of queries and access to all complex information.

Residents will be part of a complex WhatsApp group that allows ease of communication through instant messaging. This does not substitute formal communication but adds to the communication platforms to residents.

Residents will have access to support daily from 08h00 and 17h00 from EstateServ offices as well as after hour emergency support on a hotline for emergencies such as burst geysers or security issues.

FACILITIES MANAGEMENT

Site Inspection and Office Support

The dedicated Site Manager allocated to your complex will do weekly visits to the complex. These weekly visits will include:

- General property inspection
- Taking pictures and recording of units that are in contravention of the complex rules. This gets handed over to the Portfolio Manager who will formally deal with the contraventions
- Meeting with tenants and/or owners if required
- Feedback from the onsite security personnel
- Feedback from the onsite gardening services
- Feedback from any other onsite contractors

The Portfolio Manager will attend all trustee meetings.

Maintenance

EstateServ has an extensive network of maintenance contacts that are used on a regular basis to ensure that all maintenance needs of the body corporate are fulfilled.

EstateServ will oversee the complete maintenance process from acquiring quotes from various providers to overseeing the work and ensuring the maintenance work is completed satisfactorily.

EstateServ will

- Report on and facilitate any garden and maintenance problems that are/will be required
- Obtain quotes for all work and/or equipment needed for maintenance of the complex. These quotes will be obtained from approved suppliers only (either EstateServ approved or Body Corporate approved or both).
- Arrange payment to the contractor on inspected completion of the work. Work will be inspected by EstateServ to ensure that it is in line with the agreed contract. The final inspection can be arranged with a trustee or the Managing Agent, if needed.
- Log calls with council regarding water, electricity and other council issues
- Purchase and deliver consumables needed on site such as pool chemicals, cleaning materials etc

Security

EstateServ will liaise with the security provider to ensure that security is a priority and that conduct rules of the complex are adhered to by residents, visitors and contractors alike.

During weekly inspections EstateServ will ensure that all security facilities are in working order including the intercom system, biometric system, electric gates and panic alarms.

Based on past experience EstateServ will advise on additional security measures to be taken, if needed.

Meter Readings

The monthly service provided by EstateServ can optionally include meter readings. This can result in a large saving for complexes who currently use a third party to verify meter readings.

SECRETARIAL SERVICE

All approvals needed from trustees, such as the approval of quotes, is done online for an audit trail and record keeping purposes. This also allows trustees and the managing agent to refer to these quotes when needed and follow the approval process.

- Distribution of any communications required by the trustees
 - ▶ Attendance at meetings: Trustee meetings – one per quarter, annual AGM, any SGM's
- Preparing and distributing the agenda for trustee meetings and AGM/SGM's
- Keeping minutes of trustee meetings and AGM/SGM's
- Distribution of minutes of trustee meetings and AGM/SGM's
- Depositing of any cash (clubhouse rental, laundry etc)

MONTHLY REPORTS

- Number of warnings issued per month per unit. These reports will be broken into number of warnings per unit as well as categories of warnings (noise, refuse, pets etc)
- Number of queries, requests and complaints per month. This report will show
 - Ticket initial response time
 - Ticket average response time
 - Number of tickets resolved and unresolved
 - Resolution time of tickets
 - No of tickets that are reassigned and reopened
 - Tickets trends (what are the most reported issues/most queries related to)
 - Satisfaction survey from residents
- Reports on all on-site contractors (gardening, maintenance, security etc) These reports will include what the contractor has achieved in the month as per SLA's, what concerns there may be with service from the contractors and any recommendations on how these services can be improved
- Overall complex report with feedback on the state of the complex and any recommendations to improve maintenance, gardens, cleanliness and security.

MONTHLY COST AND T&C'S

- Estate Management services will be quoted on request, based on the number of units and specific requirements of the complex
- Monthly fees exclude the following:
 - ▶ Administration costs for the Body Corporate
 - Packs for trustee meeting
 - Packs for AGM's
 - Additional travel costs
 - Other bulk printing (newsletters)
 - Telephone Calls
 - ▶ Purchase of items on behalf of Body Corporate or any consumables for specific projects
- Any adjourned AGM's or additional trustee meetings (once p/quarter) will incur additional costs
- EstateServ contracts work on a month to month basis and either party can give the other party fourteen (14) days' notice to terminate the appointment.
- The monthly fee will increase annually and will be negotiated with the trustees but will be, a minimum of the Body Corporate levy percentage increase.