

WELCOME To GATCHELL OAKS



Independent Living means you can continue to live independently and enjoy a social life, with the confidence that help is at hand if you need it

YOUR GUIDE To INDEPENDENT LIVING At GACHELL OAKS

CONTENTS	Page No.
	ii-iii
Amica Care Trust – Key Facts	iv
Foreword	v
Our Trust Mission	vi
Introduction to Amica Care Trust and the Managing Agent	vii
BUYING AN INDEPENDENT LIVING PROPERTY	1
COMMUNAL FACILITIES	2-5
Reception area, Ground Floor	2
Lounge	2
Communal Dining Area and Kitchen	3
Treatment Room	3
Guest Flat – 47 Gatchell House	4
Communal Grounds	5
GACHELL OAKS INDEPENDENT LIVING MANAGER	6
GACHELL OAKS MAINTENANCE OFFICER	6
QUESTIONS AND ANSWERS	7-12
SECURITY AND YOUR RESPONSIBILITIES AS A RESIDENT	13- 15
Security	13
Emergency Call System	14
In the Event of a Fire	14-15
Absence from Gatchell Oaks	15
Stable Court Door Entry System	15
Lifts	15

INSURANCE	16
MONEY MATTERS	17-21
Service Charge	17-19
Ground Rent	19
Personal Costs	19
The Budget	19
Invoicing the Service Charge	20
Bank Accounts	20
COMMUNICATING WITH US	21-22
Procedures	21
Maintenance and Repairs	21
Consultation	21
Residents' Complaints Procedure	22
YOUR LEASE	23-25
The Term	23
Ground Rent	23
Charges for Management Services	23
Maintenance Reserve	23
Rights and Easements	23-24
Your Covenants with the Landlord	24
Resale Conditions	24
The Landlord's Covenants	24
Development Rules and Regulations	25
SELLING YOUR HOME	26
AMICA CARE TRUSTEES	27
ALPHA HOUSING SERVICES LTD OFFICE DETAILS	28

Key Facts

Your Landlord

The Trust was originally formed on 11th September 2000. Amica Care Trust relaunched under its new name on January 7th 2019.

The Trust is governed by a Board of Trustees

The Trust owns and operates four nursing and social care homes

The Homes are situated in Bromsgrove, Crewkerne, Dorchester and Exmouth

The Trust is the freeholder of 126 independent living apartments and cottages in Exmouth and Dorchester co-located with three of the Trust's Care Homes, and the independent older persons living complex here in Taunton, Somerset



The Trust's Managing Agent is: Alpha Housing Services Limited. They are a dedicated local block and estate management firm established in 1988. As members of the Institute of Residential Property Management and accredited through the Association of Residential Managing Agents, they hold high expectations of themselves.

Amica Care Trust is a registered charity who has your best interests at heart in everything we do. Led by a board of dedicated Trustees, any financial surplus is reinvested into the development of services for everyone who lives or works for the Trust

Amica Care Trust

Amica Care Trust is a charity whose purpose is to care for older people and disabled. The Trustees policy is to own and manage care services in the United Kingdom and to develop other care services of an innovative nature with particular emphasis on the provision of independent living accommodation for older people. AMICA CARE TRUST is a closed trust and the properties it manages must be self-supporting so that, at the appropriate time, further developments can be undertaken.

Alpha Housing Services Ltd is the managing agent which provides the services for the upkeep and maintenance of Gatchell Oaks. The services are paid for by the residents of Gatchell Oaks through the Service Charge.

Amica Care attach great importance of effective communication with residents and consultation on matters of importance. For this reason, it is essential that residents are fully aware of their rights, the major items within the lease, the people involved as the Landlord, the services that are provided and the way in which residents' concerns are dealt with. This Information Guide, (which is supplied to all property owners), will try to explain these points. If you have any further queries, please do not hesitate to contact the Independent Living Manager on site or the administration staff at the addresses listed on pages VII, 30 and 39 of this document.

John Whittaker
Chair of Trustees
Amica Care Trust

Our Vision

To innovate, empower and inspire everyone to create vibrant communities and to live their best lives.

Our Mission:

To provide exceptional care and support to all within our Amica communities. We help to maintain independence, creating special moments and fulfilling lives.

Our Staff Values:

- **Positive Attitude**
- **Kindness and Respect**
- **Open and Honest**
- **Working together**
- **Passion and Joy**

INTRODUCTION

The Landlord

Amica Care Trust
Gatchell House
Gatchell Oaks
Trull
Taunton
Somerset
TA3 7EG

Please note that the above address is also the address at which any notices may be served on the Freeholder (Landlord).

The property you occupy is held on a lease of 125 years. You as the lessee and the landlord are both bound by the terms of the lease and by relevant legislation. It may be that a relative is the lessee but that you live in the property. We endeavour to treat all residents as if they are lessees.

Your landlord has a legal obligation to insure, repair and renew the structural fabric of the building, including communal areas, and provide certain services. The lessees have the obligation to bear the reasonable costs of all such works and services.

THE MANAGING AGENT

Alpha Housing Services Limited has been appointed by your landlord to provide the management services set down in the lease and summarised in this information guide.

Alpha Housing Services Limited has its administration Office at:

1st Floor, 1 Chartfield House
Castle Street
Taunton
Somerset TA3 7EG
Tel: (01823) 270661

email: info@alphahousing-services.co.uk

BUYING AN INDEPENDENT LIVING PROPERTY



We kindly request that you meet with the Independent Living Manager before you buy so that you are aware of the services offered and the commitments you will be entering into.

**Your Independent Living Manager is:
SUE BASHFORD**

If you are thinking of buying one of our Independent Living properties, there are several key points you should bear in mind:

- 1 You are strongly recommended to commission a private building survey prior to purchase
- 2 This development has a minimum age restriction of fifty-five years or older for residents and purchasers/owners or those with a Relevant Disability. Relevant Disability is classified as a physical disability only and does not include those with a mental disability.
Further details are available from Amica Care Trust's Independent Living Manager at Gatchell Oaks
- 3 The Independent Living Manager is there to assist and can provide Information on the services provided which are also listed in accordance with the Schedule of Services and Charges which are reviewed on an annual basis
- 4 You should satisfy yourself that you can afford to meet the payment of service charges, ground rent and other outgoings associated with living in an Independent living property. This guide helps to identify the costs you should expect
- 5 All prospective purchasers must attend an assessment with the Independent Living Manager prior to purchase.

GATCHELL OAKS COMMUNAL FACILITIES

Those allocated parts are currently on the ground floor of Gatchell House and open to all residents of the apartments and cottages. The communal rooms can be used for both impromptu and organised gatherings and, will be available for private hire by residents on payment of a fee which will be credited to the Trust's accounts. When arranging an event, it is requested that as much advance notice as possible should be given to the Independent Living Manager. The communal areas are also available for Trust use.

The Trusts headquarters are on the first floor of Gatchell House, and residents should not access this floor without prior appointment.



Reception Area

Within the main entrance foyer at Gatchell House is available to all residents to meet and greet visitors.



Lounge

Available to all the residents on a daily basis, the lounge can be used for impromptu and organised gatherings and will be available for private hire by residents.

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Dining Room

Available to all the residents on a daily basis, the dining room can be used for organised gatherings and will be available for private hire by residents.



Kitchen

Available to all the residents on a daily basis, the kitchen is available for private hire by residents.



Treatment Room

A treatment room is available in Gatchell House for use by a chiropodist and others to provide services to the residents when required. Chiropodist, Lisa Hampstead, visits every 6 weeks on an appointment only availability over 2 days (Wed and Thurs) Massage is every 4 weeks in the Dining room with Amanda Bailey a trained therapeutic massage therapist.

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Guest Apartment

47 Gatchell Oaks is a self-catering apartment for Trust use or for rent by the residents of Gatchell Oaks for their friends or relatives. Details of charges, reservations and further information are available from the Independent Living Manager. The apartment is reserved on a first come first served basis.



The Communal Grounds at Gatchell Oaks

The gardens and external areas are for communal use and maintained for the quiet enjoyment of all residents and their visitors. Residents may be invited to 'lend a hand' should gardening be one of their interests. If you wish to be involved, please speak to your Independent Living Manager. We employ gardeners here at Gatchell for 2 days per week.



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GATCHELL OAKS INDEPENDENT LIVING MANAGER

The Independent Living Manager is a very important part of the community and is there to act as a reassuring presence, as the Gatchell Oaks representative on the spot and your friendly neighbour.

Your home will benefit from a 24-hour emergency call system as well as an Independent Living Manager whose hours are 09.00– 16.00 Monday to Friday. Your emergency call system is in the form of a pendant worn either on the wrist or round the neck. You must check your pendent monthly to ensure that it is still working.

Primarily accountable to the Amica Care Trust and responsible to the Facilities and Property Manager for the good management of Gatchell Oaks independent living accommodation in providing, high quality, efficient and effective services for the residents as required by the Trust's Memorandum and Articles of Association and in accordance with Trust policy.

GATCHELL OAKS MAINTENANCE OFFICER

The Maintenance Officer(s) is/are responsible for the maintenance of the exterior paths, car park and communal areas and works in conjunction with the Independent Living Manager for the benefit, security, and wellbeing of the residents.

Ken Lewis



Ken's hours are Monday – Friday 09.00 – 13.00

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QUESTIONS AND ANSWERS:

Do you have to be a certain age to live in the Gatchell Oaks?

A. Yes you must be 55 years or older. Ownership must comply with the age/disability restriction. Relevant disability is classified as a physical disability only, and does not include those with a mental disability. No other persons including family members (other than a spouse) under the restricted age are permitted to live in the property

Do I own my own home?

A. Yes. Each property is sold on a long leasehold basis, 125 years. (Your solicitor will be able to tell you how long is left on your lease). It is your home, held as your own asset – and, of course, you are free to sell at any stage, at full market value so your capital is kept intact, and you can enjoy the benefits of a continued investment property of your own.

Do I stay in control of my household bills?

A. You are responsible for paying your own utility bills, council tax and television licence fee as well as arranging your contents and personal belongings insurance. If you own a mobility scooter it is recommended that you take out specialist insurance for this vehicle.

Can I make alterations to my property?

A. Minor internal alterations and improvement can be made to your properties with the permission of the Trustees. Before work commences permission must be requested through completing an online form via <https://www.alphahousingservices.co.uk/contact-us/alterations-consent>. Once permission is granted, and the Trust has received the insurance details from your chosen qualified contractors, work can commence.

Will my home be looked after if I go away?

A. All properties are fitted with heat detectors in the kitchen areas and smoke detectors in the lounge areas; these are linked to fire alarms. You are kindly asked to inform the Independent Living Manager if you are going away.

Will I be able to stay in my home as long as I choose?

A. Our aim is to provide accommodation for you as an active, independent person. We can provide general housekeeping needs for anything from cleaning to ironing. Our team is always available to lend a hand, be it for a few days or only on specific occasions. You're in complete control – and you'll only pay for the services your use.

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Your home will benefit from a 24-hour emergency call system as well as an Independent Living Manager whose hours are 09.00 – 16.00, Monday to Friday. Your emergency call system is in the form of a pendant worn either on the wrist or round the neck. You must check your pendent monthly to ensure that it is still working.

Are there any social activities?

A. Residents have their own Residents' Association with an elected committee. From here, events and activities are planned. The communal areas are available for residents to use individually or for organised events, activities, or groups.

Can I have Sky TV installed?

A. We have a communal Sky Dish. All you will need to do is contact Sky and purchase your own package.

What is the procedure if I decide to sell my property?

A. You will be able to sell it on the open market. You will need to tell your Independent Living Manager and give them the details of your estate agent. Any sale must take into account the criteria that qualify potential buyers as a resident. On this development there is an age restriction of 55 years or older for purchasers/owners and residents. *More information on page 35*

What Services are covered by the Service Charge Fee?

- Building insurance
- External upkeep of the building
- Regular clearing of footpaths
- Servicing the lifts
- Equipment purchasing and repairs to enable office administration
- Servicing of, emergency call system, door entry systems, and fire alarms
- Reserve Fund
- Window cleaning
- Independent Living Manager
- Maintenance Officer
- House Keeping for Communal Areas
- Maintenance of car parking area
- Heating and lighting in communal and external areas
- Management and Admin Charges
- Pest control

Will the Service Charge increase?

A. The Service Charge fee is reviewed annually and set at a level to cover all foreseen costs.

How do I pay for my Service Charge?

A. The method of payment for the Service Charge and Ground Rent is by Standing Order monthly in advance. A account details will be forwarded with the first service charge/ground rent invoice.

What isn't included in the Service Charge?

A. The apartment you live in is owned by you, you are responsible for the water and energy bills associated with your home as well as the council tax, television licence and home contents insurance. Personal and Domestic Care are not included. We recommend that you take our personal liability insurance if you own a mobility scooter

What additional Services are available?

Guest Room (per night) £50.00 (2 guests) £60 (4 guests)

Domestic Staff (per hour):

Weekday £16.20

Weekend £19.40

Maintenance Staff (per hour) £17.20

(1/2 hour) £8.60

Chiropody as charged by provider

Prices effective from 01-Apr-2022

What is the Reserve (Sinking) Fund?

A. This is a reserve account used for larger expenses often known as major works.

Can I extend my lease?

A. Once you have owned your property for two years the Trust has no objection to you extending your lease by a further 90 years.

Is there a Residents' Association?

A. Yes. Gatchell Oaks Residents Association is a member of the Federation of Private Residents Association.

Are pets allowed?

A. Residents may keep a pet dog, cat, or caged bird, subject to two conditions. Firstly, prior permission must be obtained in writing from Alpha Housing Services Ltd through completing an online form via <https://www.alphahousingservices.co.uk/contact-us/pet-consent> and you must agree to sign our Pets Policy Agreement. Please ask your Independent Living Manager if you require further information. Secondly, the pet must not cause a nuisance to neighbours, other residents or to the Trust. If such a nuisance occurs, we have the right to revoke the permission and ask you to remove the pet(s) from the complex.

Nuisance behaviour by a pet includes:

- Roaming and unattended animals – not included is one that may occasionally escape
- Pets fouling in communal areas which is not picked up immediately
- Excessive noise
- Unpleasant odour from pets
- Aggressive animals
- Fleas.

Normally pets should not be taken into the communal rooms of Gatchell House except guide or hearing dogs. Dogs must be kept on leads within the communal ground. Should your dog foul in the communal grounds, this must immediately be picked up and disposed of within your household waste.

Please be aware that bird feeders are not allowed at Gatchell Oaks.

If you have any visitors who wish to bring pets with them to the complex, prior permission should be sought in writing beforehand.

Who is responsible for the redecoration of my property?

A. External decoration is the responsibility of the Landlord within a planned maintenance cycle. You are responsible for the internal decoration of your own properties.

Can visitors stay in my property?

A. Yes, they can for holidays, and we also have a self-catering apartment which is available for Trust use or for rent by the residents of Gatchell Oaks for their friends or relatives. Details of charges, reservations and further information are available from the Independent Living Manager. The apartment is reserved on a first come first served basis.

AMICA CARE TRUST



Where do I put my rubbish?

A. All residents are expected to take their refuse to the bin area for collection. If you are unable to do this Amica Care offers a collection service at an additional charge.

Stable Court

Please bag up your general household waste and deposit it in one of the bins in the 3 bin storage areas located around the site. It is clearly in everyone's interest that the bin areas are kept clean and tidy, and we would be grateful for your co-operation in ensuring that this is the case and that any dropped litter is picked up and deposited in the bins. Please do not overfill waste containers.

Garden and Gatchell Courts

Each property in Garden Court and Gatchell Court has its' own wheelie bin storage enclosure immediately outside the property. Rubbish should be deposited in these, and the wheelie bin taken to one of the site bin storage areas in time for collection by the contractors.

Should you need any assistance with wheelie bins or taking your rubbish to the bin storage areas please ask the Independent Living Manager or Maintenance Officer.

Rubbish collection days will be as follows:

Type	Regularity	Day
Food Waste	Weekly	Tuesday
Recycling – Cardboard, plastic bottles etc.	Weekly	Tuesday
Communal recycling	Fortnightly	Tuesday
Communal refuse	Fortnightly	Tuesday

Any changes to the above will be published by the Independent Living Manager. The local Council will require rubbish to be sorted for re-cycling. We would be grateful for your assistance with this.

Is there anywhere to park my car?

A. Each apartment or cottage has its own allocated car parking space for one vehicle only. The visitors and house car parking areas are also for use by the Trust's Headquarters staff, the Independent Living Manager and visitors.

Is there anywhere to store and recharge a mobility scooter?

A. A limited number of mobility vehicles may be parked in the cellars of Stable Court. Re-charging points are available. If you are considering purchasing one of these vehicles, and live in Stable Court, then you should liaise

AMICA CARE TRUST



with the Independent Living Manager for an available space. Please check the dimensions of the vehicle to ensure it will fit in the lift.

Can I rent out my property?

A. Yes for a period of 12 months only as long as any proposed tenant conforms with the requirements of the lease as to occupier. The tenancy agreement would contain similar restrictions, stipulations, covenants, conditions, and provisions. We would require you to ask the Trusts permission. Permission must be obtained in writing from Alpha Housing Services Ltd by completing an online form via <https://www.alphahousingservices.co.uk/contact-us/letting-consent>.

Can I change the lock on my front door?

A. No. Not without the permission of Amica Care Trust. If you change your lock without our permission, we may not be able to assist you during an emergency. You may be charged for a replacement lock.

Can I smoke in my own property?

A. Yes as long as you are not putting yourself or your fellow tenants in danger.

SMOKING POLICY

The Trust has a policy of no smoking in the communal rooms and areas of Gatchell Oaks. Smoking is also not permitted in the communal gardens.

SECURITY

Security is vital to any development and to help protect yourself and the interests of other Residents, you should observe a few simple rules:

- Secure entrance doors after use
- Do not give access to anyone appearing to be waiting for admission, always ask
- Do not allow any visitor in just because they look respectable or friendly. If in doubt, leave the caller outside and speak to your Independent Living Manager or Maintenance Officer.
- Always ask “official” visitors for their identity pass.
- Do not keep name tags or address labels on your keys, a telephone number should suffice.
- Use the door entry security system: it is there for your protection.
- Fire doors labelled as emergency exits and not in normal everyday use should only be used in an emergency.
- We would advise you not to leave ground floor windows or doors open at night or when you are out.
- If you do not recognise a caller on the door entry system, do not let them in.

It is crucial for your own security and that of others that you only allow access to personally known visitors.

YOUR RESPONSIBILITIES AS A RESIDENT

As a homeowner, you will be responsible for items such as the internal decoration, maintenance, repair, and cleaning. To ensure the safety and comfort of other residents, some simple guidelines should be followed. Most are obvious, such as respecting the privacy of your fellow residents and keeping noise to a reasonable level, but others need further explanation. We want you to enjoy living in your property and to help others to achieve the same by not causing annoyance through obnoxious smells, unsocial behaviour, unruly pets, or other similar activities.

TUNSTALL EMERGENCY CALL SYSTEM

This is an important feature and enables you to summon help in the event of an emergency.

There are a number of call points in your home, usually in the living room, kitchen and bathroom. If you pull a cord or press a button, then a call will go through to the Taunton Deane Helpline Operations Room and during the working day to Gatchell Oaks Independent Living Manager's office or mobile phone. You need only pull the cord or press the button once. The system has an integral assurance light and intermittent noise. This is quite normal and shows the system is working. You are advised to test your Amie pendant at least once a month. *(Please look after your pendant as you will need to replace them at your own cost should they become damaged or misplaced).*

We would advise that any call point cords in your property are not tied up or shortened in any way as they may be out of reach should you need them.

The call points can be activated at any time of the day or night.

A spare key to your property must be left in the care of the Independent Living Manager

IN THE EVENT OF A FIRE

Your home was designed and built in accordance with the prevailing Building Regulations and other requirements relating to fire confinement and safe evacuation.

All fire control equipment is regularly tested and serviced by a specialist contractor. We also commission a risk assessment annually. The policy at Gatchell Oaks for the majority of **Stable Court** residents is a **"stay put" policy if the fire is not originating in your property**, this is to allow the Fire Service to evacuate in a safe and controlled manner should it become necessary. The stairs must be kept unobstructed to allow the Fire Service ready access to apartments and residents; therefore, it is vitally important not to investigate the source of the fire if it is not in your property. **If the fire is in your own apartment**, then you must come out, shut the door, and make your way down the stairs only as **the lift should not be used in this event**, immediately proceed to the fire assembly point at the front of **Gatchell House**. The alarm will sound alerting fellow residents, Independent Living Manager or Taunton Deane out of hour's service based at Kilkenny Court. The apartments have fire doors that protect against fire for up to 60 minutes. Only qualified personnel are insured to use the fire extinguishers such as the Independent Living Manager and Maintenance Officer. If a fire occurs in **the cottages**, then you should immediately vacate the property, close the door, and again move to the fire assembly point and await further instructions. The fire systems will sound, if unsure and only when you have vacated the property you are asked to call 999 (just in case of communication equipment failure) and speak to the fire service or use the break glass/call point units that are situated inside the entrances to Stable Court. **If you own Stable Court numbers 7, 9, 15, 16,**

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27, 28, 33, 34 or 35 then should a fire occur in your property, you can vacate via your back doors and make your way to the fire assembly point and await instructions. There are 2 Fire Marshalls on site: (Independent Living Manager – Sue Bashford) and Tracey Shoemark (Support Office who will assist the Fire Service. If a fire originates in the basement or communal areas of Stable Court or Gatchell House, the fire doors will automatically seal the areas until the fire service investigates.

To reduce the risk of a fire inside your property we strongly recommend having your electrical goods PAT tested. Please see your Independent Living Manager for information on how to organise for your goods to be tested.

ABSENCE FROM GATCHELL OAKS

If you leave your development for any length of time, say overnight, you should notify your Independent Living Manager. Not only will this save time and worry in the event of an emergency, but it will also stop unnecessary worry on the part of the Independent Living Manager if your presence is missed. Please ensure that all taps and electrical items are switched off/unplugged as appropriate. It is the resident's responsibility to ensure the Independent Living Manager has a spare set of keys to be kept locked in her office for use in an emergency.

STABLE COURT DOOR ENTRY SYSTEM

A door entry unit is provided for those who live in Stable Court, which will enable you to speak with visitors who are waiting at the entrance door. Should you be happy with their identity, you have the facility to allow them entry into the entrance hall by operating the door entry system from your flat.

It is crucial for your own security and that of others that you only allow access to personally known visitors.

LIFTS IN STABLE COURT.

There are 4 lifts in Stable Court. Each lift serves respective ground, first floor apartments and cellar areas. The lifts are built by Landmark Lifts Limited, are of the platform variety, and have one door which opens outwards. The lift is designed to accommodate passengers and mobility buggies, but please check sizes of buggies, that can be accommodated, and lift operating procedures with the Independent Living Manager prior to use. The lifts are user operated and fitted with '**Hold to Run**' buttons. This means that if the person using the lift stops pressing the operating button the lift will stop immediately.

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INSURANCE

The development is fully insured by the Landlord on behalf of all residents. Insurance covers the building for fire and accidental damage including decorations to and any fittings or furnishings within the communal areas. The kitchen and bathroom within the accommodation will be insured under Amica Care Trust's commercial all risks policy. However, should the Tenant be found negligent for any damage caused, be it flood or fire as a result of negligence or malicious damage, Amica Care Trust has the right to pass the cost on to the Tenant, subject to contractual Terms and Conditions. Please bear in mind that certain measures must be taken if your home is to be unoccupied for a period of time.

To protect residents from claims which may arise from accidents occurring to fellow residents or visitors in the communal areas or grounds there is also a public liability policy. Where a lift is fitted there is additional insurance which also covers public liability. Injury to your Independent Living Manager or Maintenance Officer is covered by an Employer's Liability Policy, and a Professional Indemnity Policy is also maintained.

A copy of the Buildings Insurance Policy is available to all residents or Residents' Associations on request from the Independent Living Manager.

As indicated above household contents insurance is not covered within the service charge. It is therefore strongly recommended that you make your own arrangements for the insurance protection of personal valuables and the furniture and contents of your home to the full replacement value. We also recommend that you take out personal liability insurance if you own a mobility scooter.

MONEY MATTERS

SERVICE CHARGE This is invoiced annually in advance, approximately a month prior to 1 April for the ensuing 12 months

Ground Rent – all properties £200. (£0.00 ground rent if the property has a lease extension)

The service charge is the amount you pay for the upkeep of the fabric of the building and the cost of services provided in accordance with the terms of your lease. In more detail, the usual costs incurred, which make up your service charge are:

Independent Living Manager and Maintenance Officer - Costs:

- Salary
- Employers National Insurance Contributions
- Pension Contributions
- Working Uniforms, tools, training etc.,
- Telephone, line rental and business calls.

Emergency Alarm system costs, including:

- Monitoring charge

Maintenance and running costs of common parts:

- Cleaning of communal parts (labour and materials)
- Redecoration of internal and external communal areas
- Maintenance of paths and grounds (labour and materials)
- Window cleaning of communal rooms and exterior of apartment windows
- Lighting, power, and heating
- Light bulbs and sundries
- Provision and maintenance of equipment in communal rooms.
- Water and sewerage charges on behalf of the water authorities (Where applicable)
- Pest Control

Maintenance Contracts, including:

- Lifts
- Stair Lifts
- Emergency lighting
- Fire prevention equipment
- Door entry system and emergency call systems
- Communal TV, internet, and other data/media equipment

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Insurance, including:

- Buildings
 - Communal equipment including furniture, carpets etc.
 - Lift (engineering)
 - Public and Employer's Liability
 - Professional Indemnity
- (As previously stated, the insurance does not cover the contents of your own home)

Maintenance Reserve

The development has a maintenance reserve to finance longer-term repairs, renewals, and minor improvements.

The recommended value of the fund is assessed by calculating the cost and lifespan of items which may need major repair or renewal in the foreseeable future.

You are required to contribute to the fund as part of your service charge according to the terms of your lease.

It is the Trust's policy to obtain 2 quotes from contractors before agreeing to hire. These quotes are available to view on your notice board for two weeks.

Provision will be made in the fund for items of which the following are examples:

- Maintenance of the structure and fabric of the buildings
- Resurfacing of roads/car parks
- Renewal and maintenance of communal window frames
- Replacement of communal internal and external light fittings
- Renewal of communal fencing and gates
- Replacement of communal heaters
- Renewal of roof coverings and recovering of asphalt areas
- Replacement or renewal of such items as:
 - alarm systems
 - entry systems
 - lifts
 - TV aerials
 - Telephone and broadband cabling
 - communal carpeting, furniture, and fittings
 - emergency lighting
 - refuse equipment
 - gardening equipment
 - cleaning equipment
 - maintenance and upkeep/replacement of all communal fixtures and fittings.

All Maintenance Reserve monies are held in trust for the residents of the development. Any interest earned, net of tax, is credited to the fund.

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Income

Charges for private bookings of the Gatchell Oaks communal rooms will be credited to Amica Care Trust

Miscellaneous Charges

All other costs which are covered by the terms of your lease.

Accountancy Fee

This is payable to independent qualified accountants who produce the developments Service Charge accounts.

Ground Rent

Ground rent is collected by Alpha Housing Services Ltd on behalf of the Landlord in accordance with the terms of the lease.

PERSONAL COSTS

You are responsible for the payment of the following items in respect of your own property:

- Internal decoration, repairs, and maintenance
- Electricity
- Gas heating (where installed)
- Television Licence
- Council Tax
- Telephone and internet charges
- Contents Insurance
- Internal window cleaning
- Charges for false call-out to intruder alarms, where installed
- Water and sewerage costs

THE BUDGET

How are the service charges calculated?

The service charge budget will be based wherever possible, on actual expenditure in the previous periods considering any inflationary increases or allowance for planned expenditure.

Many costs in the service charge are beyond our control - e.g., the level of any future increases in the cost of utilities, insurance, materials, tax etc. - so we can only anticipate any rises or reductions that may occur.

Before the end of the financial year, a draft budget is prepared of the estimated service charges for the next financial year.

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Invoicing the Service Charge

The budgeted costs for the development are divided amongst the Lessees, in accordance with the terms of the lease. If you live in a one-bedroom apartment, your share may be smaller than for someone occupying a two-bedroom apartment.

You will receive demands for service charges in accordance with the terms of your lease. Demands will generally be annually in advance. Ground rent is payable at the same frequency.

It is requested that payment of the Service Charge should be by Standing Order. Account details and your reference to make payments will be supplied with your invoice.

Bank Accounts

Monies paid in advance for the Gatchell Oaks service charges are deposited into a client account under the name of Alpha Housing Services Ltd re: Gatchell Oaks Client A/C. Any interest earned from the account is credited to the account.

Cheque payments are paid into our general client account (Alpha Housing Services re: General Client Account).

These bank accounts are interest-bearing and held with Metro Bank plc, One Southampton Row, London WC1B 5HA.

AMICA CARE TRUST

COMMUNICATING WITH US

Procedures

In the first instance we ask you to speak to your Independent Living Manager. Your Independent Living Manager will speak with the relevant person if they cannot answer your query themselves.

You can write to us at Gatchell House. We will aim to reply to your letter in full within seven working days of receipt. However, if the queries raised are complex or involve a lot of research, it may take longer to deal with the matter. In such cases, we will acknowledge your letter and give you a response, which will not be longer than twenty-eight days.

In some cases, it may be sensible for the Independent Living Manager to visit you to discuss the contents of your letter. We may therefore arrange this by prior appointment with you.

You can also telephone Gatchell House during normal office hours, 9.00 to 4.00pm, Monday to Friday. For emergencies, out of normal office hours use your helpline system.

If your Independent Living Manager is unavailable, Alpha Housing Services are also available during normal office hours, 9.00 to 5.00pm, Monday to Friday on 01823 270661 or info@alphahousingservices.co.uk.

Maintenance and Repairs

Alpha Housing Services Ltd is responsible for the maintenance and repair of the structure and communal areas of the site. To report a problem, please speak to your Independent Living Manager or the Maintenance Officer.

Consultation

Amica Care Trust accepts its responsibility to consult with Residents on the services it provides, whilst fulfilling its obligations under the terms of the lease.

- Alpha Housing Services Ltd hold up to two general meetings with residents a year to discuss budgets, accounts and wider policies and procedures.
- In addition, we will consult on major works which is likely to have a effect on the level of service charges or which will otherwise significantly affect some or all Residents.

Residents' Complaints Procedure

We aim to give good service to Residents in a polite, fair, and efficient way. However, we recognise that things can occasionally go wrong. When this happens, we want you to tell us, so that we can improve our future performance. We are always receptive to new ideas.

Here is what we advise should be done if you have a complaint:

Stage One

We encourage all Residents to speak in the first instance to their Independent Living Manager as we know most complaints can be dealt with on a "face to face" basis. The Independent Living Manager may need to speak to their line manager before an answer can be given. We aim to provide a response to your complaint within 28 working days of you making it.

Stage Two

If you are still not satisfied your complaint has been dealt with properly, you should write to Alpha Housing Services Limited at their Taunton office. A response will be given within seven working days of receipt of your letter.

If there is a complaint to raise relating to the services of Alpha Housing Services, their complaints procedure can be found: <https://www.alphahousingservices.co.uk/complaints>

What if there is still a dispute?

If you have pursued a complaint through the above procedures and are still unhappy, the following information may be helpful:

AMICA CARE TRUST



YOUR LEASE

Your solicitor will be able to advise you on the precise terms and effect of the Lease in respect of your property. These notes are provided only for the purpose of helping you to understand your lease and to draw your attention to some of the more important points. Leases will vary from development to development and this summary cannot cover all of them.

The Term

Your title is leasehold, and the full term of the lease is 125 years. If you have bought your home since the lease was first granted, the term remaining will have been reduced.

Ground Rent

The initial rent is specified in your lease and a schedule contains provisions for its review in line with any increase in the Retail Price Index. Such reviews are carried out 15 years from the date the lease term commenced and every 15 years thereafter. If you have extended your lease, then the ground rent is reduced to a 'peppercorn' rent which in practice means this has been reduced to zero.

Charges for Management Services

As managing agent for the landlord, Alpha Housing Services Ltd charges a fee for its services.

Maintenance Reserve

The lease contains provisions for a Maintenance Reserve to be built up to meet major items of repair, replacement, or renewal.

Contributions to the fund are collected each year through the service charge.

If the RMF becomes much larger than seems likely to be required, the landlord can apply part of it to the discharge or reduction of the service charge. Conversely, if the contingency fund appears to be inadequate to cover likely capital expenditure, the landlord can add to the contingency fund through the service charge provisions. In either event, the landlord will endeavour to exercise such a right in accordance with the principles of good estate management.

Rights and Easements

Your property is sold with the benefit of rights and easements normally set out in a schedule in the lease. Similar rights are reserved for the benefit of the owners of other apartments as set out in the same schedule. The grant and reservation of rights is an essential feature of a leasehold development because of the various communal facilities and the extent to which rights necessarily overlap.

Your attention is drawn in particular to the right to use the access road, the forecourt and the various passages, landings and staircases leading to your apartment and the lift, if appropriate. You also have the right to use the paths on the estate.

You have a right to use the Communal areas in Gatchell Oaks and other facilities as made available from time to time. There use is subject to any directions from the Independent Living Manager or any regulations about them issued by the Trust.

Your covenants with the landlord

The covenants you enter into with the landlord comprise the main obligations which govern occupancy of the apartment. They cover the obligation to pay the rent and service charge, the usual council tax, water, and sewerage charges, to repair the apartment, to decorate it, etc. These covenants need to be read in conjunction with the restrictions set out in the lease and any further rules and regulations made by the Landlord.

Resale conditions

You are not allowed to divide possession of the apartment by assignment, underletting or part with possession of part of the apartment. Subject to that, you may assign, underlet, or part with possession of the whole of the apartment, subject to any age restrictions set out in the lease and subject to the landlord's consent. The age limits are in accordance with the requirements of the local planning authority. This development has a minimum age restriction of fifty-five years or older for residents and purchasers/owners or those with a Relevant Disability. Relevant Disability is classified as a physical disability only and does not include those with a mental disability.

If those age limit requirements and Relevant Disability requirements are not complied with, there would not only be a breach of the terms of the lease but probably also of the planning requirements.

The landlord's covenants

These include the important obligation to maintain, repair, decorate and keep clean, lit, and tidy all the common facilities.

Development rules and regulations

These are normally set out in Schedule 7 to the lease and may be added to from time to time. Residents are required to comply with such further rules and regulations as the landlord shall reasonably make for the good management of the estate and the benefit of the residents as a whole.

The normal rules and regulations which apply are: -

- No noise audible outside dwellings between 11.00pm and 7.00am
- No washing or banners to be hung outside
- No window boxes
- No signs or placards, including estate agent's boards, are to be displayed on or in any window or any other part of the site.
- Not to shake mats out of the window
- Not to keep a pet, without the permission of the Landlord.
- Not to re decorate the exterior of the property
- Not to erect any external radio aerial or satellite dish
- Not to alter the structure and services of the apartment without the written consent of the Freeholder.
- Not to keep firearms or other dangerous weapons
- Not to keep any paraffin or bottled gas heater or other inflammable liquids
- Not to obstruct common areas

AMICA CARE TRUST



SELLING YOUR HOME

Your home is designed as part of a retirement community so there are some restrictions on selling. However, your lease has been drawn up to allow you to sell with as few restrictions as possible.

- You can sell your home on the open market
- You can instruct local estate agents although no advertising board may be displayed
- There is an age restriction of 55 years for purchasers/owners and residents on this development or those with a Relevant Disability. Relevant Disability is classified as a physical disability only and does not include those with a mental disability.
- You must notify your Independent Living Manager that you are selling and provide your estate agents details.
- The Independent Living Manager may keep a list of interested prospective purchasers
- There is a 1.5% selling fee payable to the Trust on the sale of your property

Please Note: This Information Guide is an important reference document and should be retained in a safe place. It relates to those Independent Living complexes where Amica Care Trust is the Landlord and Alpha Housing Services Ltd is the managing agent. It is for information only and applies to properties in England and Wales and does not purport to be a comprehensive statement of law. No liability can be accepted by Alpha Housing Services Ltd for itself or on behalf of any Landlord for which it acts as agent, for any errors or omissions or for any loss or damage sustained by anyone acting in reliance on this document. Purchasers must rely solely on the advice of their own legal advisers. (Updated October 2022)

Introduction of OUR TRUSTEES



John WHITTAKER
Chair of Trustees
Chair of the Property
Group



Adam RAWICZ
Vice Chair of Trustees
Chair of the Care
Governance Committee
Member of the Property
Group & RAR* Committee



Jim BAKER
Board member
Member of the Property
Group & Care Governance
Committee



Graham BRISCOE
Board member
Member of the RAR*
Committee



Vanda CROW
Board member
Member of the Care
Governance Committee



Will DALTON
Board member
Chair of the RAR*
Committee



Gary GEORGE
Board member



Jacqueline LACEY
Board member
Member of the RAR*
Committee



Alan LADD
Board member
Member of the Property
Group



Anna WARMAN
Board member

*Remuneration, Audit and Risk

AMICA CARE TRUST



Alpha Housing Services Limited

**ADMINISTRATION OFFICE
IS AT**

**1st Floor, 1 Chartfield House
Castle Street
Taunton
Somerset
TA1 4AS**

Office Hours:

Monday – Friday | 9:00 – 17:00 (Excluding Bank Holidays)

If you wish to see us in the office, please telephone us to make an appointment as we are often out on-site visits



01823 270661



info@alphahousingservices.co.uk



www.alphahousingservices.co.uk/contactus