



Wellesley  
Residents Trust

# GUIDE



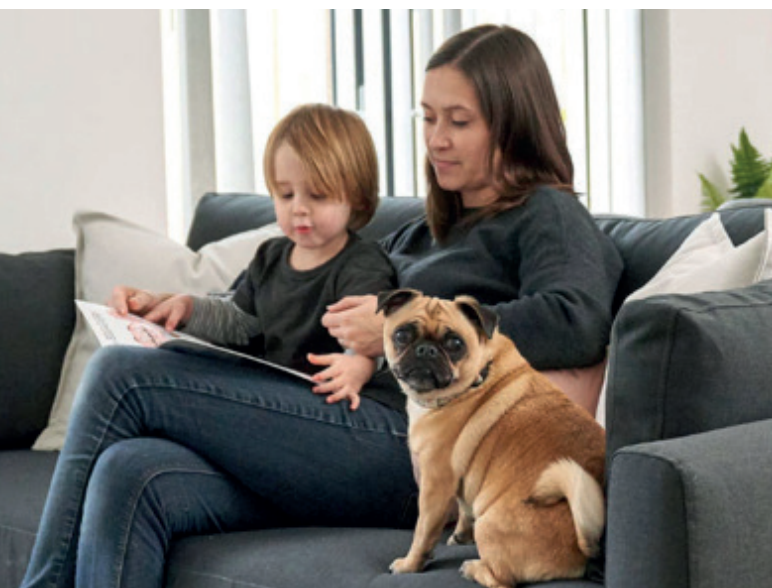


Wellesley is an exciting development of new homes in Hampshire. Featuring large open parkways, natural green spaces, community facilities and the beautiful Wellesley Woodlands, it is a wonderful place to call home.

To ensure that Wellesley flourishes, each resident will become a member of the Wellesley Residents Trust (WRT):

“ A management company which will uphold and promote Wellesley’s vision for the area as well as ensure green spaces and estate areas are maintained to a high standard.”

This guide gives an overview of the role of Wellesley Residents Trust and answers to frequently asked questions.



## Why am I receiving an invoice from Wellesley Residents Trust (WRT) and why do I have to pay an Estate Charge?

When planning and establishing Wellesley, the local authority (Rushmoor Borough Council) requested that an Estate Management Trust be created to care for the public spaces and woodlands. The Council has been actively involved in the creation of Wellesley Residents Trust to ensure that it is structured and managed in a way that will benefit Wellesley. The Trust will care for private roads and footpaths, verges, open spaces, community facilities and the Wellesley Woodlands.

To ensure that the Trust acts in everyone’s best interest, it functions on a not-for-profit basis and therefore monies can only be spent on the management and maintenance of the neighbourhood and woodlands.

On the completion of your property purchase, you signed a Deed of Covenant and Membership Certificate which sets out your obligation to pay the annual Estate Charge.

This booklet details what the Estate Charge covers and what legal obligations WRT has to you as a resident.

Each household becomes a member of the company (WRT) and members are able to join the Residents Committee.



# What does my annual estate charge cover and what areas are WRT responsible for?

As areas are handed over to WRT, it will be responsible for:

Maintaining Parks and Gardens	
Grass cutting and landscaping	As landscaped areas are handed over from the developers to WRT for ongoing maintenance, the costs for grass cutting, landscaping and other soft services such as litter picking and tree maintenance will come under WRT.
Replacing play equipment	
Tree works including surveys and surgery	
Maintaining Roads and Pavements	
Surface repairs and painting	The majority of the Public Highways will be adopted by Hampshire County Council. A small number of internal roads and courtyard areas will be handed over to WRT for ongoing maintenance. The costs for maintaining these roads and associated street furniture including lighting will come under WRT.
Clearing leaves & litter	
Wellesley Woodlands	
Services provided by Land Trust	<p>Wellesley Woodlands is a natural green space open to the public. Wellesley is surrounded by a Special Protection Area – an area of land which is home to protected species. In order to facilitate the development of Wellesley, a planning requirement was put in place to provide a Suitable Alternative Natural Greenspace (SANG) for residents to use – the Wellesley Woodlands.</p> <p>Wellesley Woodlands is managed in partnership by the Land Trust and Blackwater Valley Countryside Partnership. WRT is responsible for the ongoing management charges payable to the Land Trust.</p> <p>Long term investment for Wellesley Woodlands has also been contributed towards by the development partnership (Grainger plc and MOD).</p>
Community Facilities	
Income & donations	As the development progresses, WRT will manage the use of community facilities. Income and expenditure relating to the facilities will come under the WRT.
Overheads & utilities	
Repairs	
Sundries	
Staff	
Reserve Fund/ Contingency	
WRT Reserve Fund (a percentage of annual spend)	A proportion of the annual Estate Charge is transferred to a Reserve Fund. This will ensure Wellesley is maintained to a high standard in the future and will offset costs of planned major works which are anticipated as the estate ages.
Contingency	A small contingency is allowed for unanticipated costs.

Management	
<b>Public Liability Insurance</b>	The WRT will be required to maintain public liability insurance. This will be put in place when areas are handed to WRT for ongoing management.
<b>Management staff</b>	The company has no direct employees and uses a management company. Their fees are based on the time spent administrating the Estate Charge and dealing with company matters.
<b>Bookkeeping</b>	An accounting company will administer the bookkeeping and accounts for the company.
<b>Overheads</b>	This includes overheads for the company, such as postage, stationary and phone costs.
<b>Health &amp; Safety</b>	Health & Safety inspections including risk assessments for estate areas.
<b>Subscriptions</b>	Any professional subscriptions for the company

The above is intended as a guide and will be expanded as the development grows.

Each year residents will receive an annual budget for WRT which will provide a breakdown of specific services and the associated costs in providing them.

The services provided by WRT will expand as the development grows and more communal areas are completed and transferred to WRT.

## Estimated Annual Estate Charges

It is expected that the annual Estate Charge will increase as WRT becomes responsible for maintaining more communal areas. Residents will be kept up to date about areas being transferred via the Wellesley Living resident portal [www.wellesleyliving.co.uk](http://www.wellesleyliving.co.uk)

### Estimated charges:

Property Type	Average Sq. Ft	Estimated Estate Charge Completed Scheme)
1 Bed Flat	500	£190
2 Bed Flat	820	£312
3 Bed Flat	1200	£457
1 Bed House	650	£248
2 Bed House	850	£324
3 Bed House	1200	£457
4 Bed House	1400	£533
5 Bed House	1900	£724

These figures are provided as a guide only, the majority of the final estate costs are unknown at this early stage of development. The figures provided will be subject to change and increases in costs.



## What is Wellesley Woodlands and why do I have to contribute towards it?

Wellesley Woodlands is an area of natural green space spanning 110ha. The area is open for the public to use and forms part of the Wellesley development.

Wellesley is surrounded by a Special Protection Area – an area of land which is home to protected species. A planning requirement for the development was put in place to provide an alternative Suitable Area of Nature Green Space (SANG) for residents to use. Wellesley Woodlands was identified for this purpose.

Wellesley Woodlands is managed in partnership by the Land Trust and the Blackwater Valley Countryside Partnership and offers an abundance of wildlife, nature trails and family events to explore. Further information can be found on the woodlands website

**[www.wellesleywoodlands.co.uk](http://www.wellesleywoodlands.co.uk)**

Wellesley Residents Trust is responsible for the ongoing management charges payable to the Land Trust. The annual charge is apportioned based on the number of built homes each year out of the total 3,850 unit Wellesley scheme. Grainger Plc pay the apportion for any unbuilt homes or voids.







## What is WRT not responsible for?

WRT is not responsible for the following:

- Defects/Snagging within your property – any queries need to be directed to your housebuilder
  - Anti-social Behaviour – any concerns should be reported to the relevant bodies including the Police
  - Un-adopted Roads & Landscaped Areas not yet transferred to WRT
- any queries or concerns should be directed to the housebuilder



## When do I start to pay the Estate Charge?

WRT started charging an Estate Charge on 1st October 2016.

The WRT financial year runs from 1st October – 30 September and you will start paying the Annual Estate Charge from the date that you move into your property.

## How and what do I need to pay?

Each year you will receive a copy of the annual Audited Accounts to show you how much WRT has spent on services as well as a Budget Statement and Invoice for the forthcoming year.

Residential Management Group Limited (RMG) look after bookkeeping for WRT. All payments must be made via RMG.

Different payment options are available. More information is available on the Wellesley Resident Portal [www.wellesleyliving.co.uk](http://www.wellesleyliving.co.uk) Alternatively, you can call RMG's call centre on **0345 002 4422**.

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Alternatively, you can call RMG's call centre on **0345 002 4422**.



## How has my annual Estate Charge been calculated?

Your Estate Charge is calculated based on the square footage of your property as at the date on which you purchased it.

$$\begin{array}{l} \text{Total Estate Charge costs} \\ \div \\ \text{Total square footage of} \\ \text{your development phase} \\ \times \\ \text{Square footage of your property} \end{array}$$

## Why is the Estate Charge increasing in future years?

WRT is a not-for-profit company and residents will only be charged based on budgeted and actual expenditure.

Charges will increase as estate areas are completed within the development zones and handed over to WRT for management.

## I have a question concerning the residential estate or Wellesley Woodlands, who do I contact?

A list of contacts can be found at the back of this booklet.

Please note that until estate areas on the development are handed over to WRT for management, queries regarding specific estate areas will need to be referred to the house builder.

## An area near to my house has not yet been landscaped, why should I pay the Estate Charge?

WRT only becomes responsible for maintaining areas once completed and formally handed over from the housebuilder. The estate areas go through a thorough snagging process prior to handover to WRT to ensure the high quality of the finished area.

There can be a 12 – 24 month lead in time for estate areas to be completed and transferred to WRT for management.

You will be kept up to date about the handover of estate areas via the Wellesley Living Resident Portal [www.wellesleyliving.co.uk](http://www.wellesleyliving.co.uk)

Any queries or concerns before handover should be directed to the housebuilder.

The management of the Wellesley Woodlands is a constant expenditure which must be paid for through the WRT Estate Charge.



## I already pay service charges to other companies, why the extra one?

There is a contractual obligation for residents to pay an annual estate charge to WRT for the maintenance of the communal estate areas and Wellesley woodlands.

If you are in an apartment block, you may also pay a service charge for the communal areas around the block. These charges are separate to WRT and there is no doubling up of services.

The Estate Charge is also separate to your Council Tax charge, which will continue to be payable to the Local Authority in the usual way.

## What happens if I sell my house?

The property's registered occupier as of the 1st October is liable to pay the estate management charge for that year.

If you are selling your property you should agree with your purchaser that they will reimburse the apportioned charges from the sale completion date for the remainder of the calendar year – your solicitor should handle this.

Legal and administration costs are incurred by WRT each time a property is purchased. Therefore, a registration fee of £110 inc VAT on the initial purchase of a property and an additional admin fee if the property is subsequently sold.



## Which roads will be maintained by WRT?

The majority of roads within Wellesley are built to be adopted as Public Highways by Hampshire County Council.

In order to be adopted, the roads, footpaths, street lighting and adoptable verges have to go through a minimum contractor maintenance period of 12 months. During this period the maintenance responsibility is with the housebuilder who constructed the road. At the end of the maintenance period it is re-inspected by Hampshire County Council to ensure that it is in a satisfactory condition for them to adopt as Public Highway.

There are a small number of roads and shared courtyard areas which will be transferred to WRT.

You will be kept up to date about the handover of estate areas via the Wellesley Living Resident Portal [www.wellesleyliving.co.uk](http://www.wellesleyliving.co.uk)

Any queries or concerns before handover should be directed to the housebuilder.





## I want to put a satellite dish or TV aerial up at my property - do I need to let WRT know?

All satellite dishes and TV aerials must not be visible from any estate roads and ideally will be placed at the rear of your property.

If they are put up on the front of your property, WRT and Rushmoor Borough Council (under the Article 4 Planning Direction) may formally request this be removed.

## What happens if I don't pay my Estate Charge?

WRT is a not-for-profit company and its purpose is to ensure that a high standard of maintenance is achieved in respect of the common areas and facilities at Wellesley.

This will help to sustain the popularity of Wellesley as a new community.

As such, every resident benefits from WRT and it is in every resident's interest to ensure that the company receives the fees that each purchaser is legally contracted to pay.

In the event that a resident fails to pay the fees the matter may be put into the hands of solicitors.

In addition, the Deed of Covenant, which each purchaser signs on completion of the purchase of their home places a restriction on the title of that property. This means that WRT must give permission for the property to be transferred on a subsequent sale and any outstanding charges will need to be settled before WRT will agree to the property being transferred to a new purchaser.

## I want to build an extension, conservatory or make changes to my property - do I need to let WRT know?

Your Deed of Covenant restricts the changes you can make to the appearance of your home, with the majority of changes requiring consent of WRT, the housebuilder and the Local Authority.

If you wish to make a change to your property please send a brief description of your proposals by email to **[info@wellesleyhampshire.co.uk](mailto:info@wellesleyhampshire.co.uk)**

If acceptable in principle, you will need to provide detailed information and plans so the request can be considered formally by WRT. WRT may charge an admin fee for dealing with in depth requests and for issuing their formal consent. The WRT consent is separate to any consents which may be required from the house builder or the Local Authority, who should also be consulted.

It is also worth noting that Wellesley comes under an Article 4 Planning Direction with Rushmoor Borough Council. This has implications on the permitted development rights on your home. More information can be found at **[www.rushmoor.gov.uk](http://www.rushmoor.gov.uk)**



## Who are the WRT company Directors and how is the company managed?

WRT's current Board of Directors are the key stakeholders involved in the Wellesley development and are included in the contacts list at the back of this booklet. The company's Board meet regularly to discuss company matters.

Once 30% of the total homes at Wellesley are occupied, residents will be entitled to put forward a Resident Director to sit on the Board.



All households are entitled to become a member of the company on purchase of the property and as such will be entitled to attend an Annual General Meeting to hear more about company matters.

Details of the AGMs will be provided in the newsletter and on the Wellesley Living Residents Portal [www.wellesleyliving.co.uk](http://www.wellesleyliving.co.uk)

The day-to-day management of the company is currently being carried out by Strutt & Parker and they can be contacted by email [info@wellesleyhampshire.co.uk](mailto:info@wellesleyhampshire.co.uk)

## Wellesley Board of Directors

Investing in homes since 1912  
**grainger plc**  
**grainger trust**  
Investing in homes since 1912







## Useful Contact List

### **Wellesley Residents Trust**

[info@wellesleyhampshire.co.uk](mailto:info@wellesleyhampshire.co.uk)

[www.wellesleyhampshire.co.uk](http://www.wellesleyhampshire.co.uk)

### **Residential Management Group**

0345 002 4422

[wellesley@rmguk.com](mailto:wellesley@rmguk.com)

[www.wellesleyliving.co.uk](http://www.wellesleyliving.co.uk)

### **Land Trust / Wellesley Woodlands**

[www.wellesleywoodlands.co.uk](http://www.wellesleywoodlands.co.uk)

### **Rushmoor Borough Council**

01252 398399

[customerservices@rushmoor.gov.uk](mailto:customerservices@rushmoor.gov.uk)

### **Hampshire Country Council**

[www.hants.gov.uk](http://www.hants.gov.uk)

### **Bellway Homes Thames Valley Region**

0118 933 8020

[thamesvalley-customer care@bellway.co.uk](mailto:thamesvalley-customer care@bellway.co.uk)

Out of Hours Emergency Telephone: 01207 503 293

### **Bellway Homes South London Region**

01737 644911

[southlondon-ccare@bellway.co.uk](mailto:southlondon-ccare@bellway.co.uk)

Out of Hours Emergency Telephone: 01207 503 293

### **Ashberry Homes**

0118 933 8020

[thamesvalley-customer care@bellway.co.uk](mailto:thamesvalley-customer care@bellway.co.uk)

Out of Hours Emergency Telephone: 01207 503 293

### **Barratt Homes**

01483 508456

Out of Hours Emergency Telephone: 0345 601 6084

### **David Wilson Homes**

01483 508456

Out of Hours Emergency Telephone: 0345 601 6085

### **CALA Homes**

01784 225300

Out of Hours Emergency Telephone: 0345 117 0660



Wellesley  
Residents Trust

## Contact us

There are lots of ways you can keep up to date  
with the latest development news:

**Email:** [info@wellesleyhampshire.co.uk](mailto:info@wellesleyhampshire.co.uk)

**Website:** [wellesleyhampshire.co.uk](http://wellesleyhampshire.co.uk)

**Phone:** 01252 351966