

Croydon Council Housing Services

Estate Walkabout & Inspection Procedure (2025)

Estate Walkabout Procedure 2025			
Version	7	Approved by	ML
Date last amended		Approval date	Jan 26
Lead officer	Sue Edgerley	Review date	Dec 29
Contact	Sue.edgerley@croydon.gov.uk	Effective date	Feb 26

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1. Introduction

1.1

This procedure is a revision of the former Croydon Council's Estate Walkabouts, providing a consistent, auditable and resident-focused process. It ensures that all estates are inspected regularly, actions are tracked through the Photobook system (where possible), and outcomes are visible to residents and councillors.

Action: Resident Involvement Manager / Housing Team Managers/Estate Services

1.2

The revised procedure aligns with KPI requirements and supports the Council's regulatory commitments under the Tenant Satisfaction Measures (TSMs) for "listening to and acting on resident views."

Estate walkabouts do not replace the responsibility of staff, Housing Officers (HO), Resident Involvement Officers (RIO), Caretakers, Estate Service Managers (ESM), Repairs, etc. to remain aware of estate conditions and report issues as they see them in their day-to-day work.

2. Programming and Planning

2.1 Each Housing Team Manager (HTM) is responsible for programming a cycle of quarterly estate walkabouts per year per Housing Officer, ensuring all housing estates are covered. The programme must be shared annually with the Resident Involvement Team (RIT).

Action: Housing Team Managers

2.2 Scheduling

- The Resident Involvement Team (RIT) will request the programme from the HTM and coordinate the walkabout schedule annually.
- Programme to be requested January for the coming year (so 2026 would be Jan 2026)
- Tenant Satisfaction Measures (TSM) results, repairs/ASB data, complaints, and other performance intelligence will inform prioritisation of Frequency, length, and areas for inspection determined using.
- RI will consult with Housing Officers, Housing Team Managers, and ESMs to agree final schedules at block/estate level. This relates only to annual scheduling, not operational decision-making as additional walkabouts may be added depending on circumstance.

This ensures resources are directed where they are most needed, down to the tenancy/estate level.

2.3 The Resident Involvement Team must maintain the central record of all planned estate walkabouts, stored in the Estate Walkabout SharePoint Folder. This record will include dates, locations, responsible officers, and attendance lists.

Action: Resident Involvement Team

2.4 The confirmed annual schedule must be shared with Repairs, Estate Services and Resident Involvement and the relevant Heads of Service to support KPI monitoring.

Action: Housing Team Manager / RI Team

2.5 Estate walkabouts should normally last about one hour up to a maximum of three hours (dependant on who is attending as well) and inspection areas need to be apportioned with that time allocation in mind.

Action: Housing Team Manager

2.6 Wherever possible, walkabouts are scheduled for the morning and should start by 10:00 a.m. and afternoon walkabouts at 2:00 p.m. to avoid clashes with duty rotas and the lunch-period.

Action: Housing Team Manager

2.7 The scheduled dates for estate walkabouts are not to be varied without express written permission of the Housing Team Managers. Managers should avoid cancellation or postponement of estate walkabout.

Action: Team

2.8 The planned schedule of walkabouts should be stored centrally on SharePoint and accessible to all necessary teams.

Action: Housing Team Managers, maintained by Housing Officers

3. Communication and Invitations

3.1 Invitations must be issued at least ten working days prior to the walkabout using the approved template. Invitations are to include the date, time, meeting point, and attending officers. The annual schedule should be displayed on the Council website and on estate noticeboards (posters with QR codes to website).

Action: Housing Officer

3.2 R.I will circulate the confirmed annual schedule, once approved, to resident representatives, relevant panels and other regular invitees.

Action: Resident Involvement

3.3 All local councillors and resident representatives must be invited to attend. Invitations should also include relevant contractors (e.g. Veolia, Wates, K&T, Grounds Maintenance) as appropriate.

Action: RI Team/Housing Officer

3.4 A copy of the invitation and estate poster must be saved in the central SharePoint folder under the correct estate name and date.

Action: RI Team

4. Conducting the Walkabout

4.1 Walkabouts must be led by the Housing Officer and attended by the Estate Services Manager (ESM), Caretaker, Resident Involvement Officer, and Repairs Inspector. If a member of staff is unavailable, a substitute must be arranged and recorded.

Action: Housing Officer / Housing Team Manager

4.2 The housing officer will complete a walkabout **checklist appendix 1** identifying any issues to be addressed (not just tenancy issues) and Photobook will record/provide the detail. Following the walkabout the housing officer will update all attendees of action taken to resolve any issue raised.

Action: Housing officer

The checklists are a summary not a detailed record of every issue identified.

At the end of the walkabout the tenancy officer will sign and date the checklist and the action plan appendix 2 to formally record what issues were found.

Action: Housing officer

4.3 All repairs and maintenance findings must be recorded using Photobook, including photographic evidence and geo-tagging of issues. Each observation must be categorised by service area (Repairs, Grounds Maintenance, Caretaking, Housing Management, etc.). Repairs Inspectors must also upload all photos to Photobook.

Action: Housing Officer / Repairs Inspector / ESM

4.3 The ESM must ensure that Caretakers, when deputising for ESM, must participate actively, identifying cleaning or grounds maintenance issues.

Action: Estate Services Manager

4.4 Residents attending the walkabout should be given the opportunity to raise local concerns and highlight areas of improvement. Notes of resident input must be captured in Photobook.

Commented [SE1]: Send list of roadshows etc to NS to share with Chris Stockham from Veolia

Commented [SE2]: Make sure staff such as HO and ESM understand their role and not the caretakers etc ie theyre not the lead officer - even for cleaning etc

Commented [SE3R2]: Clarity of Roles – HO and ESM Responsibilities (Not Caretakers)

To ensure consistency, accountability, and accurate reporting, it is essential that **Housing Officers (HOs)** and **Estate Services Managers (ESMs)** understand they are the **lead officers** for all walkabouts and estate inspections.

Caretakers are not the lead officers and must not be expected to carry out or lead estate inspections.

Lead Officer Responsibilities

- HOs are the **primary lead officer** for all routine walkabouts.

- ESMs provide support on estates where the main issues relate to grounds maintenance, cleaning, or estate standards, but **they do not replace the HO as lead.**

- OMs only attend as cover if an HO is unavailable.

Caretaker Role

- Caretakers **do not lead** walkabouts or estate inspections.

- Their role is to **provide intelligence**, report issues, and support follow-up actions as required.

- Any issues identified by caretakers must still be **recorded and actioned by the HO/ESM** through the correct process.

Purpose of This Requirement

- Ensures walkabout findings are captured accurately and consistently.

- Maintains accountability with the correct team (HO/ESM).

- Supports effective follow-up, monitoring, and communication with residents.

- Prevents confusion or inappropriate delegation of core responsibilities.

Commented [SE4]: The estate improvement team will receive and review any referrals to inform future improvement works - even comments made could be play equipment etc

Commented [SE5R4]: Resident Input During Walkabouts

Residents attending the walkabout must be given the opportunity to raise local issues, concerns, and suggestions for improvement.

All resident feedback must be **recorded in Photobook** as part of the walkabout notes.

In addition:

Referral of Improvement Suggestions

- Any resident comments relating to **estate enhancements**, such as:

-
- play equipment
- landscaping
- lighting
- benches or seating
- recycling or bin storage

Action: Resident Involvement Officer / Housing Officer/Repairs/ESM

4.5 Tenancy issues such as items stored in communal areas, untidy gardens, or similar concerns should be recorded during the walkabout but followed up discreetly by the Housing Officer after the inspection.

This ensures the walkabout remains focused on estate-wide inspection and avoids on-the-spot discussions, confrontations, or delays that disrupt the planned route and objectives.

The Housing Officer should have with them the walkabout items in communal areas letter this letter may be delivered after the walkabout to alleviate the number of cases that need to be followed up once back into the office.

Action: Housing officer

4.6 Housing Team managers will quality control the estate walkabout process by arranging spot checks on estates.

Action: Housing Team Manager

4.7 Residents attending the walkabout must be given the opportunity to raise local issues, concerns, and suggestions for improvement. All resident feedback must be recorded in Photobook as part of the walkabout notes.

In addition:

Referral of Improvement Suggestions - Any resident comments relating to estate enhancements, such as:

- play equipment
- landscaping
- lighting
- benches or seating
- recycling or bin storage
- communal garden ideas
- accessibility improvements

must be referred to the Estate Improvement Team (EIT).

Action: EIT

4.8 Estate Improvement Team will:

- receive the referral automatically via Photobook reporting,
- review suggestions,
- assess feasibility,
- consider them within the estate improvement programme and future bidding cycles.

Action: EIT

Commented [SE6]: Tenancy issues such as items stored in communal areas or untidy gardens should be followed up discreetly after the inspection by the Housing Officer to avoid time consuming door knocking and confrontations during the walkabout. REWORD so not saying time consuming follow up after etc

5. Recording and Reporting

5.1 Following the walkabout, the Housing Officer must export the Photobook report and save it to the central SharePoint folder under the estate name and inspection date.

Action: Housing Officer

5.2 Within 5 working days of Estate walkabout, the housing officer will file all documents connected with the estate walkabout in the central electronic files, including those open to resident scrutiny i.e. invite letters and emails, checklist, tenancy action plans.

Action: Housing Officer

5.3 Tenancy officer to diarise a follow-up walkabout to monitor progress on any tenancy related issues identified if required. This should take place no later than 5 weeks after the estate walkabout.

Action: Housing Officer

5.4 Within ten working days of the walkabout, an Action Plan detailing items identified at the estate walkabout (appendix 3) must be produced, circulated to attendees including ward councillors, uploaded and saved to SharePoint. The plan must include target dates, responsible service areas, follow ups and progress [notes]. The Repairs officer should produce an action plan detailing repairs items identified at the estate walkabout, using the same Action Plan (appendix3), not a separate Repairs Action Plan

Action: Housing Officer

5.5 The Housing officer should also display the completed walkabout feedback (appendix 5) on the noticeboards within 10 working days of the walkabout.

Action: Housing Officer

5.6 The Resident Involvement Team must check that all required documents have been uploaded correctly (invitation, attendance, Photobook report, and action plan).

Action: RI Team

6. Feedback and Communication with Residents

6.1 A summary of outcomes and actions must be displayed on the estate noticeboard using the "You Said / We Did" format. This should be completed within ten working days of the inspection.

Action: Housing Officer / RI Team

Commented [SE7]: Matrix etc

Commented [SE8R7]: In development

6.2 Where residents do not have access to communal noticeboards, a digital copy of the summary must be emailed to resident representatives.

Action: RI Team

6.3 Estate Services should lead on noticeboards, with RI supporting to ensure all noticeboards are up to date with officer names, contact details, and estate walkabout schedules. Team Managers to quality check the plans before they are placed on the noticeboard.

Action: Housing Team Managers/Resident Involvement Team / ESM

7. Follow-Up and Escalation

7.1 The ESM must review progress against the Action Plan after four weeks, updating Photobook and confirming completed actions. Any outstanding issues must be escalated to the Housing Team Manager.

Action: ESM / Housing Team Manager

7.2 The Housing Officer to schedule and lead a Progress Review Meeting with Responsive Repairs Representative, 8 weeks after the Estate Walkabout to monitor progress and agree any remedial action to ensure all issue have been resolved or progressed satisfactorily before the next Estate Walkabout.

Notes of the meeting are to be kept by the Housing officer using the form in Appendix 4, copied to the Operational manager and placed on the central files with the other estate inspection records.

Action: Housing Officer

7.3 Repairs Inspectors are required to verify completion of technical or safety-related issues. Confirmation should be noted in Photobook and reported to the RI Team. (Through NEC)

Action: Repairs Inspector

7.4 If attendance is incomplete (e.g. missing HO, Caretaker or ESM), this must be recorded by the RI Team and escalated via the Head of Service.

Action: RI Team

8. Documentation and Central Storage

8.1 All walkabout evidence must be stored in the central SharePoint folder, organised by estate name and date. Each folder must contain:

- Invitation and poster
- Attendance list
- Photobook report
- Action Plan

- “You Said / We Did” summary
- Notes of review meeting

Action: RI Team

8.2

The Resident Involvement Team is responsible for maintaining folder access, ensuring documents are uploaded and named consistently for audit purposes.

Action: Resident Involvement Team

8.3 The Housing Team Managers will review the central folder quarterly to confirm completeness and compliance.

Action: Housing Team Managers

9. Audit, Monitoring and KPI Reporting

9.1 All estates will be monitored quarterly with Photobook providing high level KPIs. The Monitoring Checklist (Appendix 4) will provide more estate level data ensuring that evidence exists for each completed walkabout.

Action: RI Team

9.2 The Head of Tenancy will validate completion, track performance metrics, and update KPI records to evidence compliance and coverage.

Action: Head of Tenancy

9.3 Where gaps are identified (e.g. missing attendance, late reporting), the RI Team must report this to the relevant Head of Service and maintain an exception log.

Action: RI Team

10. Resident Feedback and Continuous Improvement

10.1 The RI Team will collect and review resident feedback after each walkabout cycle (quarterly). This includes comments on communication, attendance, and visibility.

Commented [SE9]: What is the cycle - so after Q1 etc -= walkabout standards for residents Survey

Action: Resident Involvement Team

10.2 Resident feedback will be discussed at quarterly review meetings with HTMs and ESMs to identify improvements or training needs.

Commented [SE10]: Diarised in

Action: Resident Involvement Manager / Heads of Service

10.3 Changes to this procedure will be made following resident consultation and approved by the Heads of Service.

Action: Director of Housing

Appendices

Appendix 1

ESTATE WALKABOUT

CHECKLIST

Use one sheet for each block or street

Action required:

1. Inspect the block/area ensuring that all relevant points on the table below are checked.
2. Housing officer to record separate notes of non-repair action required. Repairs officer to record all repairs required.

3. Housing officer to sign and date checklist on site at the end of the inspection as a true record.

Estate / Area Inspected	Block or door Nos.	Block or Street Name	Ward

THOSE PRESENT	TITLE
	Housing Team Manager
	Housing Officer
	Caretaker
	Ward Councillors
	Repairs Officer:
	Resident Involvement:
	Residents (number of)

Estate care & communal repairs: (tick to confirm these were checked on the inspection)	GOOD	AVERAGE	POOR
Grounds maintenance: (e.g. grass cutting/edging, flower bed, trees & weed control)			
Paving or potholes and signage			
Communal Repairs:			

OVERALL STANDARDS (please tick)	GOOD	AVERAGE	POOR
INTERNAL CLEANING:			

LOCATION	ESTATE	BLOCK
ITEMS	INSPECTED YES/NO/N/A	COMMENTS
ROOF ACCESS SECURE		
TANK ROOM SECURE		
ELEC INTAKES SECURE		
FIRE DOORS/EXITS		

COMMUNAL LIGHTING		
COMMUNAL GLAZING & WINDOW FRAMES		
DRY RISERS		
LIGHTNING CONDUCTORS		
DUST CHUTE HOPPERS		
REFUSE CHUTES CLEAR		
REFUSE CHAMBER AREA		
OVERFLOWS & LEAKS		
BULK REFUSE REMOVAL		
LIFTS WORKING		
DRAINS AND GULLEYS CLEAR		
PAVING/WALKWAYS/FLOORING (Check for tripping or slipping hazards)		
ESTATE ROADS		
GRASS CUTTING, TREES, FLOWER BEDS, HEDGES		
COMMUNAL DOOR ENTRY SYSTEM		
ABANDONED VEHICLES		
PARKING/GARAGE AREAS		
SHEDS		
GRAFFITI		
ESTATE SIGNS		
PLAY AREAS		
INTERNAL COMMUNAL REPAIRS		
EXTERNAL COMMUNAL REPAIRS (such as walls and fences).		

I certify this is a true record of the walkabout completed today

Housing Officer's signature:		Date:	
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Appendix 2

CROYDON
www.croydon.gov.uk

Housing Directorate
Resident involvement team
Zone 2C Bernard Weatherill House
8 Mint Walk, Croydon
CR0 1EA

«AddressBlock»

Please ask for/reply to
Resident involvement team
Ref: [Keywords]
Date: [Publish Date]

23 December 2022

Dear resident

Resident invitation - Estate Walkabout

I am writing to you to tell you about a planned inspection that will be carried out on your estate on *date month year*.

The inspection gives us an opportunity to monitor the standard of cleaning in all communal internal and external areas of the estates and identify areas for improvement. Your housing officer (Name) will be joined by a repairs inspector who will raise any repairs needed and work to ensure that health and safety issues are addressed.

Whenever possible, they will also be joined on the walkabout by an operational manager or head of service from the Estates Team., as well as some of your fellow residents. This invitation will be extended to your ward councillors and other council services, where applicable.

If you are available and would like to join the inspection, we will be meeting at xxxxxx and we will begin our walkabout at am/pm

The duration of the visit will depend on what we find on our walkabout. To enable me to prioritise the inspection route, please let me know in advance if there is a specific issue that you would like us to focus on. This will help us to ensure all concerns raised by residents are addressed during the visit

As the lead officer for the visit, your housing officer is responsible for ensuring all concerns observed during the walkabout are recorded and resolved. Items stored inappropriately in communal areas or unkempt private gardens will be recorded and addressed with the households concerned.

Within two weeks following the inspection, we will display the outcome of the walkabout on noticeboards on the estate or block. We will also distribute an action plan to those who attended, covering all areas of concern recorded during the visit, along with a target deadline for each issue to be resolved. This document will also include a breakdown of repairs requested, details of estate care and grounds maintenance tasks to be completed, and a summary of any tenancy management actions to be followed up as well as any improvements agreed.

Within eight weeks of the original visit, we will distribute a final briefing on the outcome of all areas of concern set out in the action plan. We will also invite feedback from attendees, find out what they thought about how the visit was conducted and whether we could improve the estate inspection process in any way.

I hope you will be able to join us for the visit, and I look forward to seeing you then.

Thank you,

Yours sincerely,

Resident Involvement Officers name

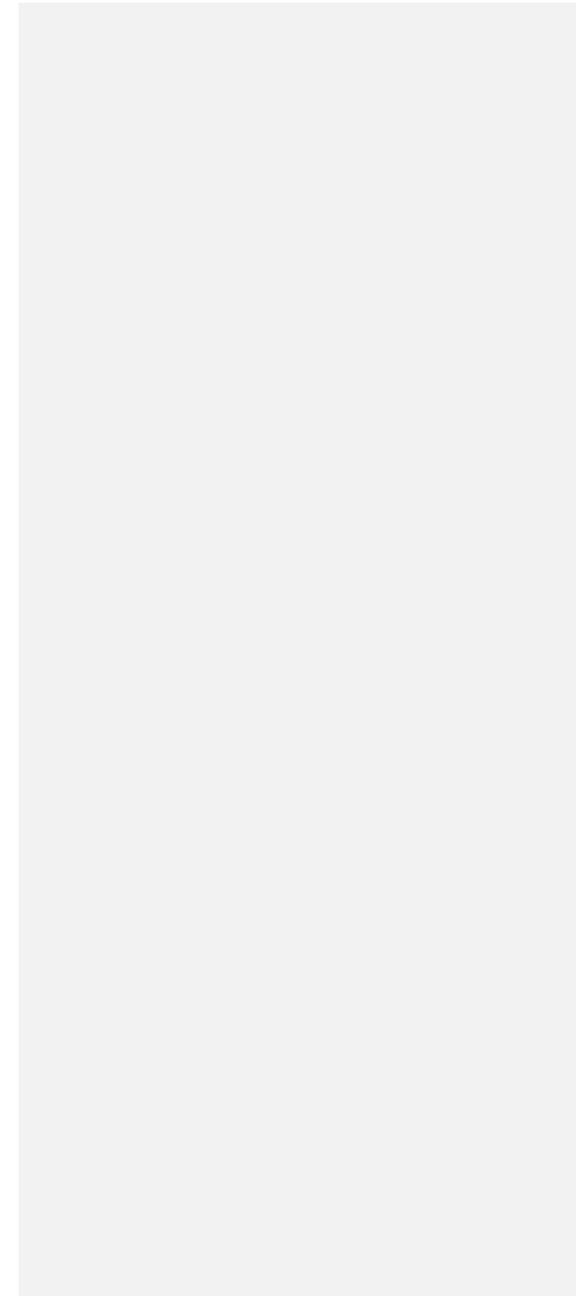
Tenancy/Repairs officer signature:		Date distributed (within 15 days of inspection)	
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Appendix 4

ESTATE WALKABOUT: RECORD OF PROGRESS REVIEW MEETING (PRM)

Estate name					
Date of inspection:		Date of progress review meeting (2 months after inspection)		Next inspection date	

Attendance at PRM:



Housing officer: (name)

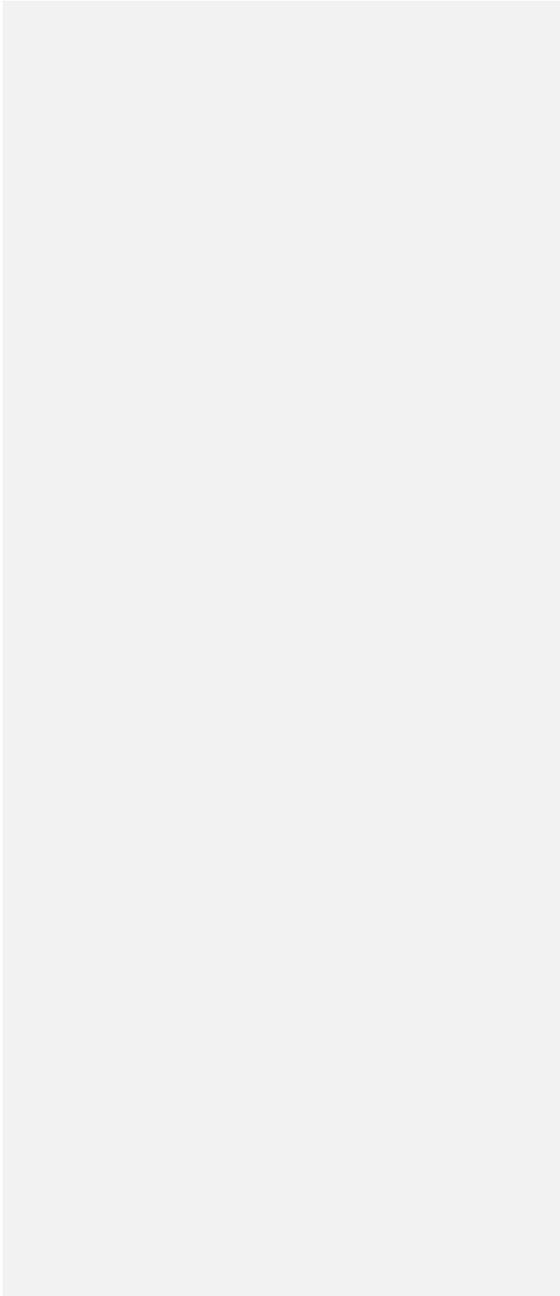
Responsive repairs representative: (name)

Resident representative (name)

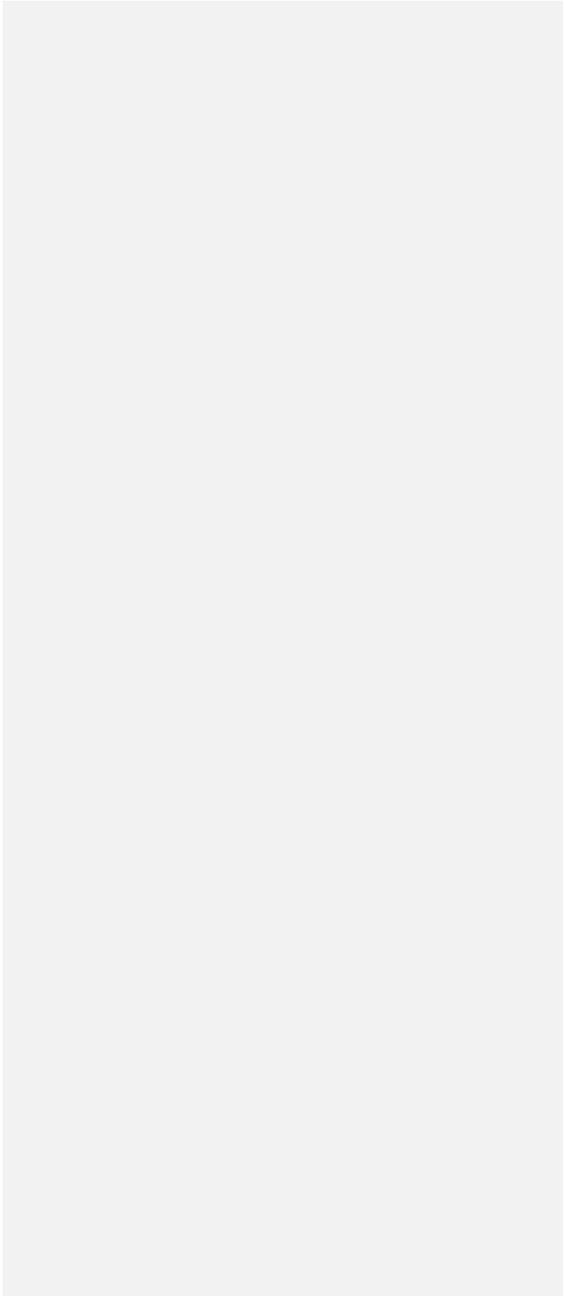
PRM meetings are chaired and record kept by housing officer.

Note: record only items from the inspection still unresolved or outstanding at the time of the progress review meeting.

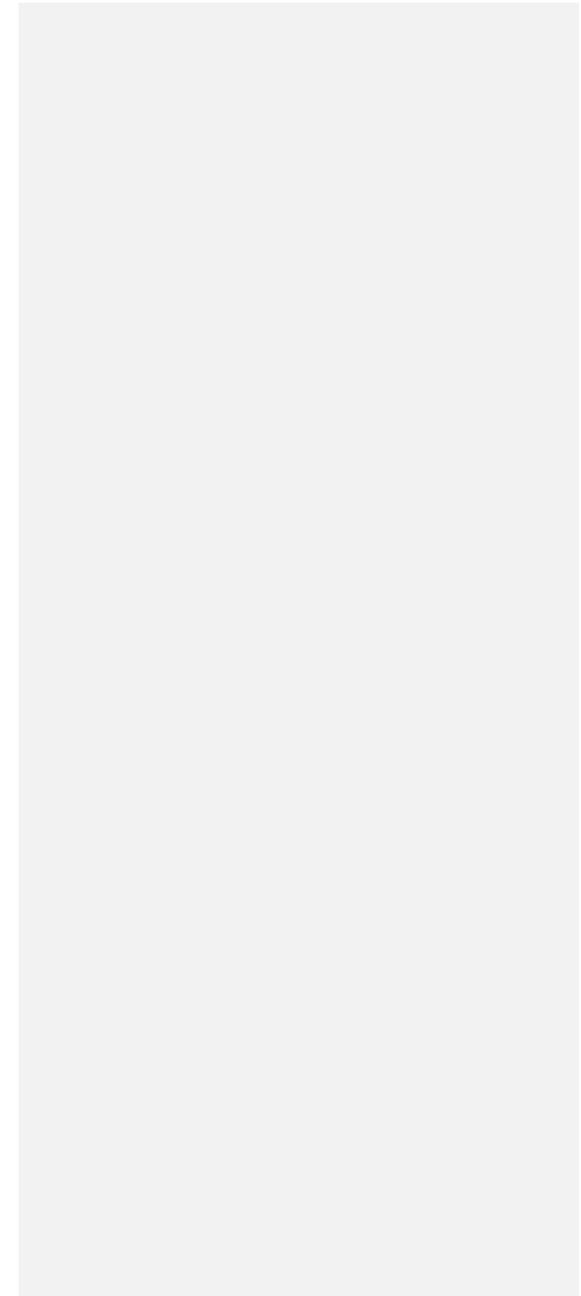
Repairs issues outstanding or unresolved				
Location	Details/description	Reason for non-completion	Remedial action needed before next inspection	Action by



Estate care issues outstanding or unresolved				
Location	Details/description	Reason for non-completion	Remedial action needed before next inspection	Action by
Tenancy issues outstanding or unresolved				
Location	Details/description	Reason for non-completion	Remedial action needed before next inspection	Action by



Housing officer Signature:		Date distributed (within 5 days of meeting)	
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Appendix 5



ESTATE WALKABOUT - HOMESTEAD WAY – 29/07/25

HIGHLIGHTED ISSUES

REPAIRS		TENANCY/ GROUNDS MAINTENANCE/ CLEANING	
	<p>ISSUE: RENEW GULLY COVER IN COMMUNAL REAR</p> <p>JOB NUMBER: 480109/1</p> <p>EXPECTED COMPLETION DATE: 08/08/25</p>		<p>ISSUE: Grass needed cutting</p> <p>Outcome:</p>
	<p>ISSUE: Cracked glass on main entrance door.</p> <p>JOB NUMBER: 480111/1</p> <p>EXPECTED COMPLETION DATE: 15/08/25</p>		
	<p>ISSUE: FB4 PADLOCK ON COMMUNAL LOFT DOOR</p> <p>JOB NUMBER: 480118/1</p> <p>EXPECTED COMPLETION DATE:</p>		

Appendix 6

Monitoring Checklist for Audit Compliance

Requirement	Completed (Y/N)	Comments / Evidence Location
Poster and invitation issued (min. 10 days prior)		
Attendance list completed and uploaded		
Photobook report exported and filed		
Action Plan produced and circulated within 10 days		
"You Said / We Did" summary displayed and uploaded		
Follow-up review completed by ESM		
Resident feedback logged		
All files stored in central SharePoint folder		
KPI updated		

Reviewed by: _____

Approved by: _____

Next Review Date: _____

Walkabout Poster Template (in Canva)



The poster features a background illustration of a residential estate with houses, trees, and people walking. In the top left, there is a graphic of an orange ID badge with a blue strap. The badge contains the text: "Date:", "Time", "Meeting place:". In the top right, the logos for "CROYDON HOUSING" and "CROYDON www.croydon.gov.uk" are displayed. The main title "Estate Walkabout" is prominently displayed in the center. Below the title, a paragraph explains the purpose of estate walkabouts. At the bottom, a list of roles to join is provided, along with contact information and a QR code.

CROYDON HOUSING | **CROYDON**
www.croydon.gov.uk

ESTATE NAME:

Estate Walkabout

Estate walkabouts let residents and staff work together to keep communal areas clean, safe, and well maintained.

Come along and join your

- housing officer - (name)
- repairs inspector - (name)
- estate services manager - (name)
- resident involvement officer -(name)

Can't make it? Want to let us know about an issue?

email:
Residentinvolvement@croydon.gov.uk

