

PLANNED MAINTENANCE & MAJOR REPAIRS PROCEDURE

1.0 INTRODUCTION

- 1.1 This procedure describes our arrangements for identifying and carrying out the planned maintenance programme to ensure that key building elements in our properties are renewed and replaced as required, and for dealing with unplanned major repairs
- 1.2 The procedure supports our Maintenance policy and complies with Scottish Social Housing Charter.

2.0 PLANNED MAINTENANCE

Producing the annual programme

- 2.1 Our planned maintenance programme is based on the results of our most recent stock condition survey. The survey report identifies the condition and anticipated life of the key building components. The survey is held in the Maintenance office.
- 2.2 Each year, prior to the start of the annual budget setting process, the Maintenance Officer(MO) will identify from the stock condition report those items that are due to be replaced in the next 1 – 3 years.
- 2.3 The Senior Maintenance Officer (SMO)/MO will produce a pre-inspection report form for each of the items identified and the SMO/MO will visit the property, inspect the item(s) and decide whether or not they should be replaced in the proposed year, or in another year.
- 2.4 If it is decided that an item should not be replaced in the proposed year, the SMO/MO will note a revised date on the original survey report.
- 2.5 If it is decided that the item should be replaced in the following year the details will be added to the proposed planned maintenance programme with estimated costs. The proposed programme will then be submitted for consideration as part of ARK's annual budget setting exercise, which will in due course result in the approval of a planned maintenance budget for the next year.
- 2.6 Following approval of the annual budget the SMO/MO will enter the estimated costs for each item on the programme to the Excel Major Repairs Forecast spreadsheet, filepath: *Maintenance/ Maintenance Folder/(year) files/Programme of Major & Cyclical Works/Major Repairs Forecast (year)*.

Implementing the programme

- 2.7 Depending on the number of properties involved at each location and the value of the work to be carried out, the planned maintenance programme will be carried out by:
- issuing individual works orders to specific contractors, or
 - issuing a specification and inviting quotations from the required number of contractors, or
 - issuing full tenders to the required number of contractors.
- The procurement method to be used in each case will be decided on in accordance with the Procurement of Goods & Services policy and the financial limits specified in the Finance procedure Prices, Quotations & Tenders.
- 2.8 Following the process 2.1 – 2.7 the Head of Property Management (HOPM)/SMO shall assess the planned programme of work, and where relevant make the formalised arrangements for the preparation and submissions of Building and Planning Warrants to the appropriate local authorities. Where there maybe uncertainty on whether these warrants are required, then, professional advice and guidance should be considered ensuring full compliancy has been achieved.
- 2.9 The SMO/MO will ensure that the relevant tenants are:
- notified of the planned maintenance works involving their properties;
 - consulted on proposed dates for the work to be carried out;
 - advised of and where required consulted on and any other action they need to take prior to work commencing, e.g. clearing all kitchen cupboards etc.
- 2.10 Where appropriate project staff will also be advised of proposed works, so that they may support tenants as required in preparing for and coping with the planned works.
- 2.11 Where the planned work is to replace kitchens or bathroom suites, tenants will be involved in the choice of items and/or colours, according to current procedures. All tenant choices at the planning stage will be fully detailed and recorded, in case of any queries being raised during or following installation.
- 2.12 Following approval of a price, quotation or tender in accordance with current procedures, the SMO/MO will:
- issue a works order to the appropriate contractor;
 - add the order number to the relevant item in the stock condition survey report.
- 2.13 The SMO/MO will carry out visits as required to check on work as it proceeds and to deal with any queries or issues etc. arising while the contractor is on site.
- 2.14 All planned maintenance works will be post-inspected, normally before the contractor's invoice is approved. The SMO/MO will notify any remedial work required to the contractor and ensure that this is completed satisfactorily.
- 2.15 Invoices will be processed and approved in accordance with the procedure Producing Works Orders and Authorising Invoices. Following approval of the invoice the MO will update the Major Repairs Forecast spreadsheet with the actual cost.
- 2.16 The SMO/MO will update the relevant Open Housing screens with details of the items renewed/replaced and, where appropriate, which item(s) are covered by a defects liability

period, to ensure that relevant repairs are carried out under the defects conditions and not charged for.

3.0 MAJOR REPAIRS

- 3.1 Major repairs are defined as large repairs with significant costs that usually happen unexpectedly, e.g. as a result of fire, flood or storm damage, or major building defects that appear often after a number of years e.g. affecting flooring, foundations, roofs etc.
- 3.2 There is no specific budget for major repairs. If the costs cannot be reclaimed under our current insurance policy the Head of Property Management will review the current planned maintenance programme budget and agree which item(s) may be deferred in order to fund the major repair required.
- 3.3 Following a decision on funding, arrangements will be made to carry out the repairs required as specified in para. 2.7 above, except that in urgent situations to make a property or group of buildings safe and secure, a works order may be issued to an individual contractor without seeking quotes or tenders, even though the value of the works would normally require them.
- 3.4 The type of damage classed as a major repair will often required the decanting of the property's occupants. Where tenants are affected the SMO/MO will liaise closely with Housing Services staff who will arrange emergency and/or temporary accommodation.
- 3.5 The SMO/MO will carry out visits as required to check on work as it proceeds and to deal with any queries or issues etc. arising while the contractor is on site.
- 3.6 All planned maintenance works will be post-inspected, normally before the contractor's invoice is approved. The SMO/MO will notify any remedial work required to the contractor and ensure that this is completed satisfactorily.
- 3.7 Invoices will be processed and approved in accordance with the procedure Producing Works Orders and Authorising Invoices. Following approval of the invoice the SMO/MO will update the spreadsheet filepath: *Maintenance/Maintenance Folder/(year) files/Programme of Major & Cyclical Works/Programme of Major & Cyclical Works (year)/Major Repairs Forecast tab*, with details of the repair and the cost.

4.0 IMPLEMENTATION & REVIEW

- 4.1 The Head of Property Management is responsible for ensuring that this procedure is implemented when required, and will ensure that it is reviewed at least every three years.

Approved by the SLT

Review of procedure due by

Complies with

November 2020

Scottish Social Housing Charter