



Providing Choice



Addressing Inequalities

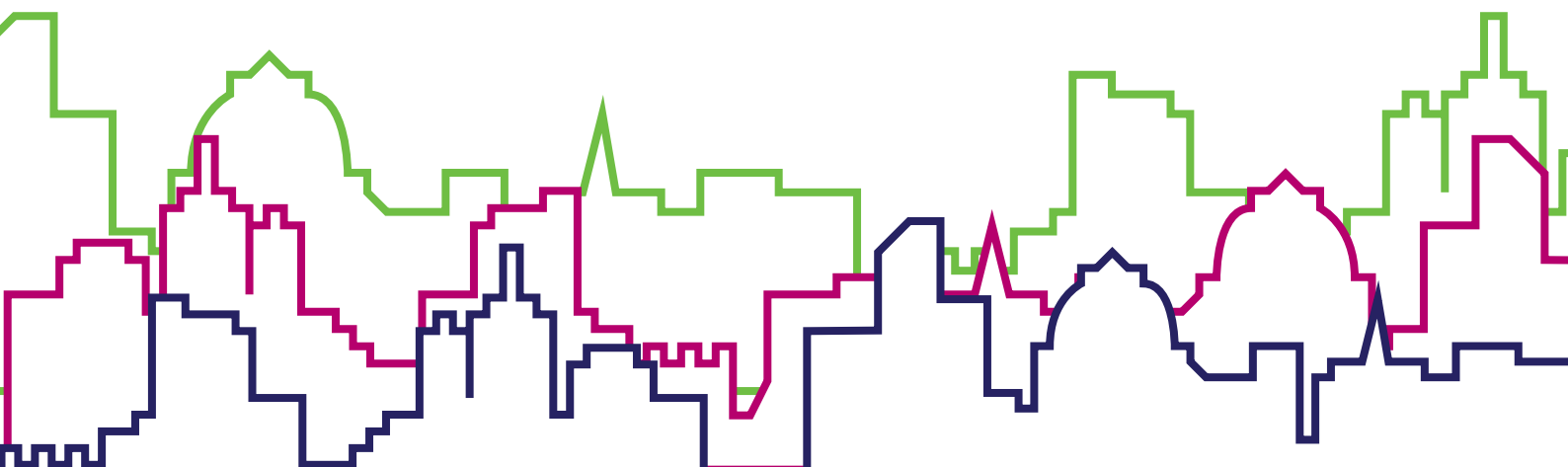


Improving Life Opportunities



Cyclical & Planned Maintenance Procedure

This procedure relates to the establishment of programmes for cyclical and planned maintenance.



Cyclical & Planned Maintenance Procedure

1. Introduction

1.1 This procedure relates to the establishment of programmes for cyclical and planned maintenance.

1.1.1 Cyclical maintenance is carried out on a regular basis, usually on no more than a five or six year cycle.

1.1.2 Planned maintenance arises from the Asset Management Plan; a short term reflection of works identified through the Stock Condition Survey.

1.2 This procedure should be read in conjunction with the Tenders, Estimates & Quotations Procedure and the Budget Preparation & Setting Procedure.

2. Cyclical Maintenance

2.1 External Decoration & Decoration Of Common Parts

2.1.1 Preparing The Schedule

In September each year the Maintenance Manager should draft a schedule of all properties that are due to be redecorated in the coming year. This will normally reflect the those properties referred to in the Asset Plan for the following year and as advertised in Unity News and other publications or by other methods of communication to the tenants.

These should include properties that were held back in the current year but should exclude any property that are

- Identified in the programme but are in good condition
- Due to be refurbished or improved in the coming year
- Short life properties
- Wholly managed by external agents except where the contract with the external agents provides for the Association to carry out such works.

The schedule should be circulated to Housing Services staff who may advise of further exclusions on grounds listed above and will advise the Maintenance Manager of any access problems that are likely to be encountered or specific needs of

individual tenants. Where the Asset Plan is located with access for all to view on the IT system this is not required.

2.1.2 Drafting The Specification

The Maintenance Manager will arrange for the Maintenance Officer or the Clerk Of Works to visit and inspect the properties properties, including all isolated properties to draw up a specification of works required, including a schedule of pre paint works that will be required.

Unity works closely with Crown Paints Ltd. The Maintenance Manager or Maintenance Officer will agree the contract specification with this company, reflecting on any problems associated with the current year's performance.

The Maintenance Officer will draft a schedule of pre-paint repairs not included in the contract specification. This work will be tendered alongside the main contract, but would be done separately. This may be done through the Schedule Of Rates Contract where appropriate.

2.1.3 Tendering

Against this list the Maintenance Manager should use his or her industry knowledge to cost the works for budget purposes, identify a list of suitable contractors from the Approved List and canvass their willingness to tender and then invite them to tender in accordance with the Tenders, Estimates & Quotations Procedure.

2.1.3 Contract Supervision

On awarding the contract the Maintenance Officer will write to those tenants or leaseholders affected, informing them of the programme and access arrangements.

A pre-contract meeting should be held involving the Contractor, Maintenance Manager or Officer, Housing Officer (where appropriate) and Planning Supervisor (where appropriate), before the contract is due to commence.

Crown Paints Ltd is expected to provide regular on site supervision to identify and respond to any problems relating to the decorating specification and take these up with the contractor. Any issues should be confirmed in writing and copied to Unity together with the outcome of those issues.

The Maintenance Manager or Maintenance Officer may appoint a Planning Supervisor (where appropriate) to ensure that CDM regulations are adhered to. The Clerk Of Works and /or the Maintenance Officer will post inspect all works and draw up snagging lists once the work is complete. If CDM is not a requirement of the contract there will still be a need to have a snagging list drafted for each contract.

2.1.4 Post Contract

The Maintenance Officer in consultation with the Tenant Participation Officer should arrange for a questionnaire to be sent to tenants affected by the works, asking for feedback on their satisfaction with the quality and efficiency of the contractor, and raising any problems that they encountered. This questionnaire may take the form of a simplified customer satisfaction card and be forwarded to the tenants when they notified regarding the works or at any other time during or post the contract period.

The Maintenance Manager should arrange to meet with the Maintenance Officer, the Clerk Of Works, the Planning Supervisor (where employed), the Tenant Participation Officer and where appropriate the Contractor to discuss the contract and the results of the tenant survey.

Lessons learned should be reflected in changes to work practice or to the procedures.

2.2 Service Contracts

2.2.1 The principles surrounding service contracts are the same across the board, however the periods over which the contracts are offered will vary and care should be taken to ensure that the periods identified in the following table are reflected in contract specifications.

2.2.2 Service Contracts - duration of contract:

Contract	Suggested Period (in years)
Gas Servicing	2 - 5
Asbestos	2 - 5
Electrical Testing	2 - 5
Landscape Maintenance	3 - 5

Communal Cleaning	3 - 5
Fire Alarm & Equipment	3 - 5
Lifts	2 - 5
Warden Call	1 - 5*

*warden call service may be a condition of installation

2.2.3 Pre-Tender

Prior to tendering the Maintenance Manager should review the contract specification and contractor performance with the Maintenance Officer and other interested members of staff.

Contracts which are due to expire should each be subject to a contract review. This should take place at least two months before the contract expires.

The review should involve the Maintenance Manager / Maintenance Officer and the Contractor (where appropriate).

For the Landscaping & Cleaning contracts, as part of the review process, the Maintenance Manager/Maintenance Officer should liaise with the Tenant Participation Officer to arrange for a customer satisfaction questionnaire card to be forwarded to tenants seeking their views of the frequency and quality of the service

2.2.4 Tender Preparation

The Maintenance Manager should prepare a schedule of properties that are to be covered under the contract and make provision for contract variation for properties that come into management during the contract term.

2.2.5 Tendering

Having drawn up and agreed the specification the Maintenance Manager / Maintenance Officer should put the work out to tender in accordance with the Tenders, Estimate & Quotations Procedure.

3. Planned Works

3.1 Major Works Associated With Stock Condition Survey

3.1.1 The Asset Management Plan identifies a five year programme of major works stemming from the Stock Condition Survey.

3.1.2 Preparing The Programme

Each year prior to the work year in question, the Maintenance Officer should discuss with Housing Officers the proposals for the coming year, taking on board their comments and recommendations and report these back to the Maintenance Manager for consideration to be included in the specification and/or contract documentation.

The Maintenance Officer should inspect properties within the proposed programme to ensure that the work planned is required, and that none of the properties is subject to other works that would affect the programme.

If changes are made at this stage the Asset Management Plan & Stock Condition Survey information should be updated as appropriate.

If capacity is released by moving work out of the proposed programme consideration should be given to pulling work forward from the following year or re-profiling the budget to cover other areas of expenditure.

3.1.3 Costing, Scheduling & Tendering The Programme

As the Association has a 5 year Asset Plan detailing the works required for the next 5 year period, the budgets have been set by the Finance Department.

The Maintenance Manager should discuss the schedule of works with the Maintenance Officer and produce a plan to deliver the programme that includes tenant consultation, choice as appropriate and any temporary moves that may be required to complete the programme. Where tenants are required to move or be decanted to allow for the works this must be agreed in advance with the Housing Services Manager.

The Maintenance Officer should then ensure that the works are fully specified and tendered in accordance with the Tenders, Estimates & Quotations procedure.

3.1.4 Contract Supervision

The Maintenance Manager should ensure that once underway work is effectively supervised by the Maintenance Officer, Clerk of Works and/or the Planning Supervisor as appropriate. The Maintenance Officer will ensure that tenants are kept aware of any problems associated with delivering the programme as agreed.

3.1.5 Post Contract

The Maintenance Officer in consultation with the Tenant Participation Officer should arrange for a satisfaction questionnaire card to be sent to tenants affected by the works, asking for feedback on their satisfaction with the quality and efficiency of the contractor, and raising any problems that they encountered. This can be sent at any stage during or post contract.

The Maintenance Manager should arrange to meet with the Maintenance Officer, the Clerk Of Works, the Planning Supervisor and (where appropriate) the Contractor to discuss the contract and the results of the tenant survey.

Lessons learned should be reflected in changes to work practice or to the procedures.

3.2 Scheme Improvements

These are covered by a separate procedure

3.3 Aids & Adaptations

These are covered by a separate procedure

3.4 'Unplanned' Works

3.4.1 A contingency budget for 'unplanned' works will be set each year. The purpose of this budget is to pick up the potential costs involved in works that are unforeseen but that would normally be covered under one of the planned works headings.



3.4.2 Works in this category are likely to be required as a matter of urgency due to a health & safety issue, an emergency or may be additional work required directly as a result of the planned programme.

3.4.3 The budget for these works can also be used to cover under budgeted works elsewhere in the programme.

4. Procedure Review

4.1 Unity will review this procedure annually and provide for interim review in light of policy change or practical usage.

4.2 This procedure is not subject to Board approval.

4.3 This procedure is owned by the Maintenance Manager and was first produced in December 2004.

4.4 This procedure was reviewed in May 2006, June 2007 and September 2009

