



Planned Maintenance Policy

July 2022 - 2025

Prepared By

Document Owner(s)	Organisation Role
Richard Walker	Home Services Director
James Butterworth	Asset & Development Manager

Manual Control Version

Version	Date	Author	Change Description
1.0	January 2019	Martin Sherman	
1.1	May 2022	Martin Sherman & Richard Walker	<ul style="list-style-type: none"> • Changed title from Component Replacement Works Policy • Updated policy date period, ownership of policy and job titles • Included balance of customer needs with asset requirements, and communication plan • Included asset life spans • Included 'in-year' replacement approach and tolerances • Included reporting processes

Planned Maintenance Policy

1.0 Introduction

- 1.1 This Policy relates to all planned replacement programmed works, including the replacement of fixtures, fittings and building components either in bulk or individual project work.
- 1.2 Planned works programmes are supported by the Stock Condition Survey information held in the Asset management system, Integrator.
- 1.3 This procedure is supported by Procurement Strategy which details contract durations and renewal timescales.

2.0 Property Selection

- 2.1 Each year a series of planned replacement works are identified for completion by the Asset management plan. The properties which are selected reflect the component lifespan and the condition in accordance with the Decent Homes standard as well as using resident insight to balance 'wants and needs' with the component lifespan where possible. Where not possible, priority will be given to the asset requirements based upon the criteria within this policy.
- 2.2 A list of assumed replacements is communicated to Residents for information purposes, taking account of at least 5 years of improvements. These dates of replacement are indicative due to the nature and lifespan of the component, wear and tear, changes in legislation and financial budget available at the time. Residents are made aware of the impending programme at survey stage and by the contractor at least one month prior to the works commencing. Planned maintenance programme spanning the next 5 years will be publicised and shared with residents
- 2.3 Asset lifespans used for PFH's Capital Programme are:

Windows	30 Years
Roof	80-110 Years
Kitchens	20 Years
Bathrooms	30 Years
Boilers	15 Years
Structure	30 – 120 Years
PV Solar Panels	25 Years
Lifts	30 Years

3.0 Specifying the works

- 3.1 The Asset & Development Manager provides the yearly list of work approved by the Board for drawing up a programme of work. These works are assessed for suitability on the programme by the assets team prior to procuring a contractor or framework provider. The programme is considered for resource requirements, commencement dates, compliance requirements, specification, material assessments and value for money effectiveness.
- 3.2 Once the budget for each category is approved, further analysis of each list of

properties requiring work is desktop assessed. At this stage confirmation of the scope of work at each property is required and confirmation of who is to project manage the work. This can be by PFH surveyor or project managed by an external organisation on contract.

- 3.3 The programme should allow for ad-hoc approval of additional in-year replacements that occur by default, or are required due to changes in legislation etc. A 10% to 20% margin is within tolerance and should be reviewed in quarter 3 to accelerate the use of the unallocated budget on items identified in the asset system.

4.0 Contracts

- 4.1 The procurement of each contract is subject to value, duration, complexity and size. Framework contracts are used traditionally for replacement works which can extend over a number of years in accordance with procurement rules. However, individual projects can be tendered to provide one off contracts. The decision process is based on the PFH Procurement Strategy

5.0 Contract supervision

- 5.1 Upon awarding the contract the Asset & Development Manager will inform residents affected by the programme of works and confirm access arrangements and provide the specific Contractors details.
- 5.2 The contractor shall visit the residents before the works are due to start on their property and comply with all the relevant contract conditions.
- 5.3 The Asset & Development Manager shall ensure that the works are kept under supervision and shall ensure regular inspections of the work in progress. Any problems identified shall be reported to the contractor in writing and discussed in regular contractor management meetings. The specific Terms and Conditions of the Contract shall be adhered to and supersede all other requirements.
- 5.4 KPI s will be set prior to commencement and form part the contract conditions.
- 5.5 The Property Surveyor shall ensure that snagging lists are drawn up and provided to the contractor prior to the handover of properties. Any retention of funds will be in accordance with the contract conditions and subject to any defects being fully rectified.
- 5.6 Contract meetings will be set and a relevant agenda for managing the contract specifics and conditions provided by the client.

6.0 Contract payments

- 6.1 The Property Surveyor shall ensure that all payments are correct for signing off and past to the Asset & Development Manager for administering payment.
- 6.2 Payment terms should be met that reflect the contract conditions and in accordance with PFH terms of agreement.
- 6.3 Additional items, amendments to the contract, omissions or variations shall be

approved prior to any works commencing. The contract terms shall apply to variations.

7.0 Confirmed work schedules

7.1 If property lists are provided to the contractor, confirmation of the actual work on site will be required. This is subject to the relevant schedule of rate being applied or the contractors actual works costs which may differ from property to property.

8.0 Quality standards

8.1 The Quality standard of works shall be in accordance with the relevant code of practice, any specification provided by PFH or acting agent and good practice trades guild guidance.

8.2 A benchmark for the Quality of workmanship shall be provided for reference throughout the contract period. This will take the form of a sample of works or product placement at the commencement of the Contract.

8.3 The progress of the programme will be reported to SLT on a monthly basis, demonstrating performance and delivery against the plan, in respect of timescales, costs and customer experience.

9.0 Review

9.1 This procedure shall be reviewed three yearly by the Homes Services Director and Asset & Development Manager.