



Pre and Post inspections Policy

July 2022 - 2025

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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"> • Updated policy date period, ownership of policy and job titles • Updated guide %age pre inspections • Introduced inspection as part of complaint investigation process • Introduced clear expectations around damp and mould reports • Introduced concept of 'virtual/remote' inspections • Updated monitoring section to reflect need to align with service standards

PRE AND POST WORK INSPECTIONS

1.0 Introduction

- 1.1 Contract management of work carried out on behalf of Pickering & Ferens Homes is subject to Quality control measures.
- 1.2 The works are to be in accordance with good practice standards, specific contract conditions of PFH and the legislation pertaining to the actual discipline to ensure best value and compliance.
- 1.3 To ensure compliance with these standards post inspection of works are required to monitor performance & ensure standards are adhered to, contract specifics are met and quality and financial compliance is achieved.
- 1.4 On occasions pre inspections of repairs and maintenance are required for clarifying of actual works when information about the repair or work is not complete or apparent. Pre inspections should be kept to a minimum to avoid unnecessary operational time and delays in service delivery for residents. As a guide no more than 10% of pre inspections should be undertaken across the total of work instructions sent to contractors each month. Contractors should be used for this purpose as part of their remit to diagnose the fault and complete the repair.

2.0 Types of inspection

- 2.1 Voids, planned or programmed maintenance work, capital replacement programmes are post inspected as a matter of course and/ or in accordance with the contract conditions. Post inspections of these types of work can be an amalgamation of self-contractor audit and PFH audit.
- 2.2 Post work telephone audits contribute to the overall service monitoring of repairs. These are usually carried out by the customer services team upon completion of the work and provide instant customer satisfaction feedback and pick up potential workmanship issues where further investigation is required.
- 2.3 If a customer complains about the standard of a repair, this will be inspected by PFH as part of the complaint investigation.
- 2.4 A minimum 10% of all reactive work is post inspected.

3.0 Pre inspections

- 3.1 The main purpose of pre-inspections is to provide additional accuracy to repair requests where information provided by residents/staff member is not sufficient and requires clarification. Circumstances include:
 - To avoid abortive visits and achieve right first-time fix by contractor owing to inadequate information being made available.
 - Ensure value for money through accurate specifying of the repair
 - Identify damage caused by residents & potential insurance claims

- Where additional work may be required to be specified

3.2 In addition, the pre-inspection visit can be used to discuss other tenancy related matters with the resident or to generally check on the condition of the property.

3.3 Pre-inspecting no more than 10% of repair work is satisfactory and provides value for money by utilising the repairs operatives efficiently without unnecessary duplication.

3.4 The Property & Compliance manager will monitor the number of repairs pre-inspected in order to manage the resource requirements and ensure repairs are carried out efficiently.

3.5 The following list shows the usual situations giving rise to the need to undertake a pre inspection: -

- Properties where there have been repairs requests from a resident which are not possible of being specified and ordered from the resident's description of the problem and its cause. This could also be solved by a surveyor ringing the Resident to clarify any technical nature of the call without pre inspecting onsite.
- Properties where a large number of faults/repairs are reported by the resident.
- Properties still in the defects period following the handover of a major contract (new build, rehabilitation, re-improvement or major repair) and where the fault may be covered by the contract.
- Properties where insurance claims may arise for a reported fault.
- Properties identified as in need of major repairs or will be subject to programmed maintenance work within the year.
- We will always aim to inspect reports of damp and mould, and surveyors will manage such cases through to satisfactory conclusion, including post inspection and suitable 'aftercare' arrangements. All cases of damp and mould will be tracked and monitored through the Home Services Directorate meetings.

4.0 Making a Pre-Inspection

4.1 Most pre-inspections will be carried out by a PFH Surveyor, who will identify standard work items together with appropriate estimates. The repairs will be recorded and ordered on the Housing management system.

4.2 If it is clear from the outset that it is likely to be a complicated repair, appropriate estimates or schedule items of works will be specified by the PFH Surveyor and the appropriate budget allocated or approval sort for budget purposes.

4.3 If the damage could result in an insurance claim, the surveyor shall refer to the insurance claims procedure.

4.4 Where technology is available alongside resident choice and technical ability, pre-

inspections may be carried out virtually through video calling type technology in order to provide quicker diagnosis and immediate feedback. This may be facilitated through another PFH colleague or partner on site if available.

4.5 Appointments with residents for pre inspections should be made unless circumstances dictate for ease of delivery / efficient use of time a cold call is appropriate. Cold calls are always followed up by:

A) checking the Resident is available and happy for the inspection to take place, and
B) identification of PFH staff Card or verification of identification is given by PFH office.

5.0 Post-Inspections

5.1 Post-inspections are carried out by a PFH Surveyor to ensure:-

- Repairs are carried out to the performance, quality standards and timescales set out by the association.
- That the work actually carried out tallies with the works ordered and invoiced for and that value for money has been obtained.
- Compliance with relevant professional, statutory and health and safety requirements.
- Resident satisfaction.

5.2 The association has a target of post-inspecting no less than 10% of the works carried out.

5.3 The inspections are carried out as part of the day-to-day duties of the property service team.

5.4 Post inspections can be made without appointments for ease of delivery / efficient use of time. Cold calls are always supported by:

A) checking the Resident is available and happy for the inspection to take place, and
B) identification of PFH staff Card or verification of identification is given by PFH office if requested prior to entry.

5.5 The Property & Compliance Manager shall ensure that a representative number of repair jobs are post-inspected in order to aggregate 10% checks by contractor during each financial year.

5.6 The Property & Compliance manager shall maintain and monitor a check list to ensure that the target is met monthly.

5.7 To ensure that post-inspections are representative of the routine works orders issued & they cover all trades the list should include appropriately balanced internal and external repairs, sizes of work order and types of service.

5.8 If defects are found, take up any deficiencies in the quality of the work, adherence to completion targets and other matters with the contractors as they arise. In the event of serious shortcomings by the service contractors, the Property and Compliance Manager shall agree an appropriate course of action in accordance with the contract.

6.0 Monitoring

- 6.1 The Property and Compliance Manager shall produce a monthly report on the post inspections by each contractor.
- 6.2 100% of major adaptations, Voids & planned works are to be post-inspected.
- 6.3 Whilst the value of repair works can be minimal, it may still be appropriate to inspect the works for quality and satisfaction of service.
- 6.4 Order values under £250 where the contractor has carried out additional work without prior authorisation should be prioritised when choosing the 10% check.
- 6.5 Inspections will be undertaken in accordance with service standards and timescales agreed with PFH residents. From time to time customer feedback will be requested to understand their experience of inspections, and use this feedback to improve processes and policy.

7.0 Review

- 7.1 This policy shall be reviewed at a change of contract or any significant changes in legislation taken place or 3 years.

8.0 Summary Process

Pre inspections

To be carried out only where the information is unclear and the resident is unsure and the fault diagnosis is uncertain. Repairs arising from pre-inspections will be raised immediately.

Where the works is likely to be more complicated than just a typical repair.

To be monitored at less than 10% of all repairs to ensure best value of resources and relevant to the work carried out is being achieved.

Voids, planned works, Capital replacement & project work is to be 100% checked on completion.

Complaints regarding standard of repair will always be inspected as part of the complaint investigation.

Where consultants are engaged as Employers agent / clerk of works, inspections are carried out in accordance with the contract conditions.

There will be circumstances where contractually the contractor carries out the post inspection and in these circumstances an additional 10% of the works will be required for consistency of the quality of inspection made.

If the inspections are finding defects on the 10% check a decision to increase the frequency should be made by the Home Services Director.

Post inspections

10% minimum of all repairs and maintenance work carried out each month.

A representative sample of the type of work and each contractor involved.

Any value of works can be post inspected including works where additional items have been identified by the contractor direct (Values under £250) and not previously authorised should be included as a priority.

Where replacement planned works are extensive, for example the window replacement programme, where extensive post inspection of every unit is required, these inspections will form part of the overall post inspection programme and count towards the 10% minimum target.

These types of inspection do not have to be logged on the housing management system as this is too onerous for administrative purposes. The contract file / spreadsheet inspection sheet is sufficient.

Issues with post inspections:

Financial discrepancies to be reported to the contractor and agreed to close off the inspection.

All financial discrepancies to be reported to the Property & Compliance manager.

Quality discrepancies to be reported to the contractor and a rectification method agreed.

The Property & Compliance Manager monitors defects found and report a summary provided to SLTon a quarterly basis through KPIs.

Continued discrepancies will be managed by the relevant contract conditions.

Monitoring of inspections

A formal process for managing the inspections and reporting is required monthly by the Property & Compliance Manager.

Performance will be reported on a quarterly basis through the KPI compliance report.

Resident engagement

Residents should be kept aware of the performance at an appropriate meeting and any feedback used to improve the service level.