

PLANNED AND CYCLICAL MAINTENANCE POLICY

Policy Name	Planned Maintenance and Improvement Policy		
Policy Ref			
Review Date	November 2024 2021		
Purpose	REVIEW & APPROVE		
Next Review Date	November 2027		
Services Delivery Sub Committee			
Author	Kevin Lynch		
Internal Policy		To be published	X

Changes Following Policy Review

The association carried out a review of the Energy Performance Certificate Policy in November 2024 and the following changes have been made;

1. Introduction – this has been changed as some references were no longer relevant.
- 2.7 – 31/3/15 has been removed as not relevant.
- 3.3 – Job title changed to Capital Works Manager
- 3.5 - ***as we move beyond the deadline for EESSH 1 and consider options on how to achieve EESSH 2*** – This has been removed as there is no EESSH 2 at present.
- 3.6 – Job title changed to Capital Works Manager
- 3.9 – Reference to EESSH 2 removed
- 3.13 – This section has been re-written as reference to EESSH 2 and associated dates are no longer relevant.
- 4.3 – Reference to sheltered estates removed.
- 4.4 – Landscape Maintenance - ***apart from our estate in Barnhill***, this has been removed as maintenance is carried out in Barnhill.
- 4.6 - Electric Wet Central heating Installations**, this has been removed as there is no requirement to service these systems and they are checked during an EICR inspection.
- 4.7 – Solid Fuel Heating Installations – this has been removed as we no longer have solid fuel systems.
- 4.8 – Job title changed to Maintenance Manager
- 4.10 - **Smart Technology Maintenance** – This has been changed to ‘annual testing of specialist protective systems in various schemes’ as we have this equipment installed in more than one place.
- 4.11 **Sprinkler Systems** – This has been added due to new legislation requiring sprinkler systems to be installed in all new properties
- 4.12 – Oil Fired Heating Systems – This has been added as there was no previous reference to this.
- 5.2 – Wording changed and dates removed as HUB is fully operational
- 6.1 – Procurement – Wording changed to advise of compliance
- 6.2 – Removed
- 8.5 – Removed

Charter Outcomes	Number(s) C13, C24 - 31
The Customer/landlord relationship	1.Equalities 2.Communication 3.Participation 4.Quality of Housing 5.Repairs, Maintenance and Improvements 11. Tenancy Sustainment
Housing quality and maintenance	4. Quality of Housing 5. Repairs, Maintenance and Improvements
Neighbourhood and community	
Access to housing and support	
Getting good value from rents and service charges	

Written by	Kevin Lynch
Department	Asset Management
Approval Date by Committee	

Notes:

Policy drawn up with reference to:

Housing (Scotland) Act 2001

Housing (Scotland) Act 2010

Housing (Scotland) Act 2014

Reference made to the following sources and other guidance:

SFHA Raising Standards in Housing

The Scottish Housing Regulator's Regulatory Standards

The Scottish Social Housing Charter

1. INTRODUCTION

1.1 This policy sets out the key objectives for the planned and cyclical maintenance of Angus Housing Associations homes, for the future

sustainability of the Association and the benefits to our customers and to the links with the Business Plan and Asset Management Strategy.

2. AIMS AND OBJECTIVES

- 2.1 The Aims and Objectives of this Policy Document are:
- 2.2 To ensure Angus Housing Association maintains its stock in accordance with all legal requirements and in accordance with an appropriate division of responsibility for repairs between tenants and the Association.
- 2.3 To set out Angus Housing Association's Maintenance Policies to ensure value for money and high standards of customer service are achieved in all maintenance matters.
- 2.4 To ensure that the Association offers existing and prospective tenants a healthy and safe environment in which to enjoy their tenancy and call home.
- 2.5 To ensure Angus Housing Association provides an efficient and effective Planned Maintenance and Improvement service to our tenants.
- 2.6 To put in place a framework for continuing to develop our knowledge of the condition of our stock, have costed plans for its lifetime maintenance and improvement and be able to demonstrate that we are making adequate financial provision for planned maintenance and improvement work.
- 2.7 Any stock still not meeting SHQS, will be considered for future improvement and planned maintenance programmes.
- 2.8 To ensure that the Association has robust and accurate data on stock condition and standard, in order to enable plans to be put in place for the Energy Efficiency Standard for Social Housing, (ESSH) and to implement those plans.
- 2.9 To forge strong relationship between the Association's planned programmes and life cycle costings and ultimately our 30 year business plans.
- 2.10 To ensure that the Association recognises the requirements of the Scottish Social Charter and those Indicators directly related to Asset Management and to put in place policies and procedures that will assist with compliance.
- 2.11 To ensure that annual and other servicing contracts are implemented efficiently and in accordance with legislation and/or good practice

- 2.12 To develop means by which tenant feedback on the planned maintenance and improvement service is taken into account.

3 PLANNED REPLACEMENTS AND IMPROVEMENTS

Section C3.1 of Performance Standards – *“RSL’s should know the condition of their stock, have costed plans for its lifetime maintenance and improvement, and be able to demonstrate that they are making adequate financial provision for planned maintenance and improvement work.”*

- 3.1 The Association has a Strategy, which aims to prolong the useful life of the properties and to provide a comfortable internal and external living environment for its tenants.

3.2 Stock Condition Surveys

- 3.3 The Association has in place arrangements for annual stock condition surveys, on a rolling programme, targeted at capturing data from each of its estates over a 5 year period. Each year a number of estates amounting to approximately 1/5th of the housing stock will be inspected and a survey report with conclusions and recommendations, submitted to the Capital Works Manager.

- 3.4 The survey and subsequent programme disseminates between the Association’s individual estates, thereby detailing separately, the condition and information pertaining to each different house type. Information can then be cloned for each house type, when 100% access is not achieved, thereby ensuring that detailed and accurate information is available for each property in each estate

- 3.5 This will develop further, the Association’s knowledge of the condition of each of its estates and specifically target SHQS and Energy Efficiency performance (EESH). The data and recommendations will form the backbone of the Association’s 5 year Improvement programme and 30 year Life cycle costing exercise.

- 3.6 These surveys will be carried out by external consultants who can demonstrate specialist knowledge and experience of SHQS, energy efficiency and EESH. The Capital Works Manager, Maintenance Manager and Asset Management team will have the opportunity of examining the final report and comment on its accuracy.

- 3.7 Stock condition surveys are recognised as a method of obtaining access to all of our properties over a 5 year period. This enables any tenancy issue to be highlighted as well as property condition,, reported back to the Association and appropriate action taken.

3.8 Programme of Planned Maintenance and Cyclical Works

3.9 The information which influences the Association's annual planned maintenance and improvement programmes is derived from the following:-

- Annual inspections of the housing stock and components, (see above)
- Core component replacement items already in the Planned Maintenance 30 year plan
- Feedback from customers
- Recent legislative requirements
- Requirements of EESSH.

The basis of the planned programme are individual major component replacements, (i.e. Roofs, windows, doors, etc.) The Improvement element would relate to situations where the association chooses to improve the current specification, e.g. high performance windows and doors, increased insulation, installation of solar PV.

3.10 Cyclical Maintenance

This is any work relating to maintenance work carried out on a regular cycle, and would generally include the following:-

- Maintenance Painterwork
- Pre-painting Repairs
- Gutter Cleaning, (normally included in the painting contracts).

The Association has developed a rolling painting programme with re-paints scheduled every 6 years. This will be updated as and when required but realistically this should be reviewed annually when past year's costs and quality is assessed.

3.11 Consultancy Work

3.12 The Association will employ consultants, if necessary, to carry out various inspections and specialist surveys in addition to consultancy work required for capital, planned and cyclical maintenance works. The costs for consultancy work for the latter will be included in the Programmes and costings for the relevant projects.

3.13 Energy Efficiency

3.14 The Scottish Government introduced legislation in December 2023, that stated no new gas connections would be permitted in new developments or to existing properties.

- 3.15 This will re-shape our future replacement heating programmes, costs and lifecycles.
- 3.16 Careful planning and consideration to the end user will be paramount in our efforts to meet the standards.

4. CONTRACT SERVICING

- 4.1 In addition to the Association's commitment to improve the condition of its properties and ensure a quality responsive repairs service, we are also required to carry out various checks and proactive maintenance of various components and elements of our housing stock. This can often be termed as cyclical maintenance as it relates to work that is carried out on a regular basis, as a matter of course.
Work includes, but is not restricted to:-

- 4.2 Emergency Lighting Systems** – Emergency lighting systems in all estates where there is common closes, will be inspected and tested annually by a maintenance contractor.

- 4.3 Security Systems** – All security systems, where installed, will be maintained and tested annually by a maintenance contractor.

- 4.4 Landscape Maintenance** – The Association is responsible for the maintenance of all Association owned soft and hard landscaped open space areas, other than house and flat private gardens. The Association will ensure that all soft and hard landscaped areas are kept in a neat and tidy condition, free from danger to tenants and the general public. This would include the following:

- Grass cutting every two weeks during Spring, Summer and Autumn, (average 16 cuts per year).
 - Litter collection every two weeks
 - Weed control
 - Shrub maintenance
 - Forestry maintenance
 - Tree and hedge maintenance
- Annual inspections of hard landscaped areas will also be undertaken to continually assess their condition and play areas and play equipment every 3 months.

- 4.4 Gas Fired Central Heating Systems and Installations** – Angus HA will arrange for annual servicing and maintenance of all gas fired central heating systems and all other gas installations and pipework, in strict accordance with current Gas safety Regulations. (Please refer also to the Gas Servicing Policy).

4.5 Electric Periodic Testing- The Association shall also carry out annual inspections of electrical installations within our properties. Electrical Installations within rented accommodation should be inspected and tested every 5 years. The Association will therefore develop a rolling programme and inspect and test electrical installations within a number of estates amounting to 1/5th of the housing stock annually. A suitably qualified consultant and contractor will be employed to carry these out and report back to the Maintenance Manager with conclusions and recommendations. These will include any the testing of any equipment that the Association owns and electrical installation in common areas. This is regarded as good practice by NICEIC and the Electrical Contractors Association.

The information and recommendations derived from these reports will also influence the make up of the Association's planned maintenance programme for the following few years.

4.6 Renewable Heating and other Technologies - The Association will arrange for annual servicing and maintenance of all renewable heating systems and other technologies, including solar panels. The contractor carrying out the servicing shall also provide a 24 hour repairs service. If and when the Association install other forms of renewable technologies, we will ensure that follow up maintenance contracts are in place.

4.7 Smoke Ventilation Maintenance

The Association only has one smoke ventilation system at Hill St, Montrose, which is serviced on an annual basis.

4.8 Emergency Lighting Systems (Common closes and staircases) – Emergency lighting systems in common closes, staircases and landings will be inspected and tested twice yearly by a maintenance contractor on a term basis.

4.9 Portable Appliance Testing - We are required to carry out portable appliance testing on every electrical portable appliance owned by the Association. We will employ suitably qualified contractors to carry out the work and maintain a detailed database of appliances with relevant dates and data.

4.10 The Association also carries out various other regular servicing contracts,

- **Smart Technology Maintenance** – annual testing of specialist protective systems in various schemes.
- **Septic tank Cleaning** – six monthly visits to clear out our installation in one estate only, Kaims Cottages in Airlie.
- **Stage 3 Adaptation Servicing and Maintenance** – many of the medical adaptations we install may require annual maintenance, primarily the undernoted:-
Stairlifts

Clos-o mat WC's
Hoists
Changing table
Arjo Bath

- 4.11 **Sprinkler Systems** – An annual inspection will be carried out to sprinkler systems, to check sprinkler heads and water pressure. This will be carried out by a specialist contractor on a term basis
- 4.12 **Oil Fired Heating System** – An annual inspection is carried out to this one system we have.

5. FINANCIAL PLANNING

- 5.1 Through Life Cycle Costing mechanism the Association is able to ascertain the future financial maintenance requirements, (on a medium to long term basis). The Asset Management and Finance Departments will continue to work closely and regularly to ensure that the Association is fully aware of its long-term commitments. (Life Cycle Costings are the subject of a separate policy). There are and will continue to be strong links between the life cycle costings and the Association's 5 year financial planning.
- 5.2 The Association uses the HUB Asset Management System as the core facility for Life Cycle Costings, as well as Homemaster.
- 5.3 The Association will then be able to set aside funding primarily from its rental income for maintenance expenditure.
- 5.4 The Association will present an annual programme and where possible, a 5 year Improvement Programme to the Management Committee for consideration
- 5.5 The agreed annual programme shall be prepared and arranged to ensure that the work is carried out within the financial year. The programme will also take account of Best Value principals and wherever practical co-ordinate contract works to minimise upheaval for its customers

6. PROCUREMENT AND MONITORING OF CONTRACTORS

- 6.1 Angus Housing Association is committed to procuring contractors in accordance with current procurement legislation.

7. OWNER/OCCUPIERS

- 7.1 When planned, improvement or cyclical maintenance work is being considered for common parts of a building, or estate where there is/are

one or more private owners, we shall ensure that a full consultation process is followed.

- 7.2 Guidance on division of responsibilities is available from title deeds and these should be followed accurately to ensure that the Association is not exposed to any future challenges.
- 7.3 It is important that early communication is made before the tender process, clearly spelling out the Association's intentions and what responsibility the owner(s) have.
- 7.4 It is important to obtain signed mandates from owners where there is likely to be high value works and particularly where the Association is in the minority.
- 7.5 Please also refer to the Policy on Owners and Maintenance for guidance.

8 DEFECTS

- 8.1 When planned and cyclical maintenance and improvement works to tenanted houses are carried out, the contractor responsible will not be released from his responsibilities through the issue of a Practical Completion Certificate until all defects identified by the Association are attended to.
- 8.2 During the Defects Liability Period (normally 12 months) after completion of a contract, (issue of certificate of Practical Completion), the original contractor will be responsible for rectifying defective work at nil cost to the Association.
- 8.3 Where latent defects are discovered after the expiry of the Defects Liability Period, the original contractor will be pursued via the consultants involved in the project to ensure that such defects are remedied at no cost to the Association.
- 8.4 When repairs are reported by tenants during a Defects Liability Period, a record of the action taken by the Association will be kept and contractors will be expected to respond by confirming that work has been completed.

9 DEVELOPMENT OF PROPERTY DATABASE

- 9.1 The Association will aim to continue to develop the volume and quality of information contained within the HomeMaster database. At present EPC's, Electrical certificates, completion certificates are saved in the database. However, we will explore the flexibility of the system to accommodate other relevant and useful maintenance data and

information, associated more with stock condition and component specification.

10 CUSTOMER FEEDBACK

- 10.1 We aim to encourage feedback from customers following completion of all planned maintenance and improvement contracts, in the most appropriate manner applicable to that contract, normally face to face during post inspections, follow up calls, or via the association's tenant portal
- 10.2 Any individual adverse feedback will be followed up by either a visit or call to the tenant or owner.
- 10.3 The Association will take cognisance of any consistent trends or comments that may be relevant for future maintenance works.

11 DEVELOPMENT OF MAINTENANCE PROCEDURES

- 11.1 The Association has detailed Procedures for all Staff to compliment this Policy. Review of these procedures is delegated to the Management Team.

12. COMMITTEE REPORTING

- 12.1 In order to monitor the Association's performance and that of its contractors, quarterly Reports will be submitted to the Service Delivery Sub Committee .
- 12.2 For The Planned and Cyclical Maintenance Programme, committee reports shall cover performance, progress and spend compared to budget.