
Overview

This standard is aimed at anyone who is responsible for managing services provided by contractors or suppliers (either external or from other sections within their companies). This includes one-off orders, fixed-term and rolling contracts. Services may include the establishment and maintenance of property security.

When managing service providers you will need to have plans in place for dealing with unexpected events such as the gardener being ill or the cleaners not turning up.

Lifts, boilers, gas appliances, electrical equipment, fire extinguishers and other equipment have specific regulations and requirements for registration, inspection and insurance.

In the context of this standard service providers may include:

- contractors
- cleaners
- gardeners
- insurers
- company secretaries
- auditors

Relevant interested parties may include:

- clients
- service charge payers / owners
- neighbours (where there are shared responsibilities for maintenance etc.)
- insurers
- regulators

Advice may be provided by:

- colleagues
- insurers
- solicitors
- specialists

Liaison with others will include service charge payers / owners and may include:

- clients
- colleagues
- managers

Relevant paperwork may include:

- receipted invoices
- statements of accounts
- written guarantees and warranties etc.

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Confirming completion of works may be via:

- a surveyor
- clients / service charge payers / owners
- visits to the property

This standard covers:

- letting contracts for services
- agreeing the ways in which the project will be carried out and managed
- the management of contract delivery with respect to quality, progress and cost
- checking contract compliance and arranging payments of service providers

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Performance criteria

You must be able to:

Let contracts for the supply of services

- P1 identify service providers who are capable of supplying the required services
- P2 assess the suitability of service providers for specific contracts based on the size of the contract and the competence of the service provider (including where necessary any registrations)
- P3 invite suitable service providers to bid for contracts
- P4 arrange for contract documentation to be sent out to potential service providers
- P5 evaluate bids to supply services against criteria including competence of service providers, value for money, possession of relevant procedures, registrations and insurances and an assessment of potential contracting risks as agreed with relevant interested parties
- P6 negotiate improvements to bids in a professional manner
- P7 select service providers, checking that all contract requirements are satisfied by the selected bid
- P8 seek agreement on your selection from relevant interested parties
- P9 award contracts to selected service providers ensuring that copies of the contract are circulated to all relevant interested parties
- P10 seek advice during the letting of contracts

Establish working methods with service providers

You must be able to:

- P11 establish directions for types of project including routine maintenance (including cleaning and gardening), major works and other services
- P12 give specific and achievable instructions to service providers
- P13 record your instructions for future reference
- P14 agree lines of communication between your company and service providers
- P15 agree the processes and timings for reviewing service delivery
- P16 agree the procedures to be used if variations to services or contracts are needed
- P17 keep full and accurate records of decisions and agreements

Control contract progress

You must be able to:

- P18 regularly check that contract delivery meets the required specification
- P19 liaise with others on project progress and quality
- P20 where complaints are made by third parties, check their validity and respond as necessary
- P21 where you identify failings with regard to quality, ask for these to be corrected within a given timescale

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- P22 ensure that work being carried out by service providers complies with legal and statutory requirements
- P23 ensure that service providers maintain appropriate insurance cover throughout the project
- P24 identify circumstances where progress is likely to vary significantly from plans
- P25 investigate the circumstances of these variations and agree corrective action including providing feedback to service providers on the need for improvements and appointing other service providers
- P26 identify likely variations in cost and agree corrective action
- P27 keep full and accurate records of problems, decisions and agreements

Arrange payment of service providers in line with contractual obligations

You must be able to:

- P28 make enquiries about the completion or progress of relevant works when invoices are received for ongoing maintenance and completed works
- P29 check invoices for ongoing maintenance and completed works to ensure that the amounts are correct and that the payments are due at this time
- P30 identify invoices which are to be queried (where work is incomplete, inadequate or behind schedule) and promptly contact service providers to clarify problem areas and agree corrective actions
- P31 identify invoices which are not to be paid, either in full or in part, and inform those responsible for payment accordingly giving clear statements of your reasons why payment should be withheld
- P32 ensure that invoices are allocated correctly to the budgets
- P33 pass invoices to those responsible for payment in good time to allow for payment within service providers' trading terms and to take advantage of discount terms for early or prompt payment
- P34 ensure that all relevant paperwork is obtained and stored for future reference and use

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Knowledge and understanding

You need to know and understand:

Let contracts for the supply of services

- K1 how to identify potential service providers
- K2 how to evaluate potential service providers
- K3 contract documentation
- K4 the interested parties who may need to be consulted
- K5 how to negotiate changes and improvements to bids
- K6 how to select service providers against contract requirements
- K7 procedures for awarding contracts
- K8 the potential sources of advice on letting contracts
- K9 the implications of relevant legislation, regulations, guidelines and codes of practice
- K10 how to take account of the basic principles of building construction and maintenance when developing and letting contracts

Establish working methods with service providers

You need to know and understand:

- K11 how to establish project directions
- K12 how to give instructions to service providers
- K13 the possible lines of communication
- K14 the options for carrying out projects
- K15 the options for timing of work
- K16 procedures for agreeing variations to services and contracts
- K17 the importance of keeping records
- K18 the contingency plans which are built into contracts
- K19 the implications of relevant legislation, regulations, guidelines and codes of practice
- K20 how to take account of the basics of building construction and maintenance when establishing working methods

Control contract progress

You need to know and understand:

- K21 the specification for the work which is required
- K22 how to monitor quality, progress and cost
- K23 how to balance quality and cost to achieve value for money
- K24 principles and methods of effective project management, your own strengths and weaknesses in this area and where help may be sought from others
- K25 how to liaise effectively with others
- K26 how to agree appropriate timescales for improvements in quality
- K27 the legal and statutory requirements relating to the work being carried out

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- K28 the need to ensure that insurance cover is maintained by service providers
- K29 how to identify variations in progress and cost
- K30 the corrective actions which are available
- K31 how to agree corrective action with service providers
- K32 how to take account of the basic principles of building construction and maintenance when progressing contracts

Arrange payment of service providers in line with contractual obligations

You need to know and understand:

- K33 procedures for checking works
- K34 procedures for authorising and paying invoices
- K35 the reasons why you would query invoices
- K36 the reasons why you would withhold payment of invoices
- K37 the trading terms of your service providers
- K38 procedures for storing account related paperwork
- K39 the implications of relevant legislation, regulations, guidelines and codes of practice
- K40 how to take account of the basic principles of building construction and maintenance when judging contract completion or progress

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