

### Overview

This standard is relevant to all managers who are responsible for ensuring that properties are maintained. Monitoring of project start and progression may be via an appointed agent in some circumstances.

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

People affected by works may include:

- service charge payers / owners
- freeholders
- insurance companies
- colleagues
- neighbours

Interested parties may include:

- colleagues
- service charge payers / owners
- freeholders
- owners / residents of neighbouring properties
- site staff
- insurers
- service providers

Relevant people from whom to seek instructions may include:

- colleagues
- service charge payers / owners
- freeholders
- owners / residents of neighbouring properties

Circumstances which require you to liaise with others may relate to:

- company policy
- management agreements
- legislation
- codes of practice
- insurance requirements etc.

Relevant documentation may include:

- leases / deed of conditions / title conditions
- contracts with suppliers
- legislation
- codes of practice

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Types of maintenance include:

- maintenance or replacement of appliances
- regular or routine maintenance
- emergency or non-routine maintenance
- redecoration programmes
- building repairs

In Scotland, managers will need to understand:

- The implications of the law including but not restricted to:
  - Title Conditions Act 2003
  - Tenement Act 2004
  - Abolition of Feudal Tenure (Scotland) Act 2000
  - Housing Scotland Act 2006
- The key differences between English and Scottish systems

This standard covers:

- responding professionally and effectively to requests for repairs
- arranging of maintenance work for properties which you manage
- ensuring that maintenance progresses satisfactorily

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### Performance criteria

#### Respond to requests for maintenance

- You must be able to:*
- P1 arrange routine inspections of properties to establish maintenance requirements, where necessary, and in line with organisational procedures
  - P2 identify and acknowledge requests for repairs from interested parties, including any arising from inspections, emergencies, and non-urgent matters
  - P3 seek further information relating to the types of maintenance requested and the expectations of those requesting repairs
  - P4 record and store this information for later use
  - P5 identify any responsibility which your company has under the management agreement and other relevant documents
  - P6 identify whether existing warranties, guarantees or maintenance agreements apply
  - P7 decide, within the limits of your authority, including those for finance, the action to be taken including decisions: to instruct contractors or site staff, to organise inspection of properties, to seek authorisation of work, to take no action at this time, to advise that responsibility lies elsewhere and to advise insurers
  - P8 seek instructions and authorisation from relevant people
  - P9 where responsibility for repairs lies with others, you advise them accordingly
  - P10 inform those who requested repairs of the action being taken
  - P11 accurately record your response to requests

#### Arrange for the maintenance of managed properties

- You must be able to:*
- P12 identify the need for maintenance work based on: requests for repairs, problems identified by you or your colleagues and maintenance programmes
  - P13 check that sufficient funds are in place to undertake the required maintenance work
  - P14 where funds are insufficient, you take steps to access additional funding
  - P15 make an informed choice of contractors to carry out maintenance based on the nature of the works, the list of approved contractors and suppliers, available funds, value for money and any existing warranties, guarantees or maintenance agreements
  - P16 ensure that these contractors have appropriate health and safety procedures and insurance cover
  - P17 identify foreseeable problems which may arise from the proposed works

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- P18 identify ways to minimise these problems
- P19 inform those who will be affected by the works of the arrangements for works and where possible agree these arrangements taking into account the timing of works, arrangements for access and security and ways of minimising foreseeable problems
- P20 give clear and unambiguous instructions to contractors at an appropriate time to allow work to commence including clear specifications for works, details of access and security arrangements, health and safety requirements, ways of minimising foreseeable problems, agreed timescales for works and monitoring, agreed budgets for works, agreed arrangements for future communication
- P21 notify insurers of the details of work where appropriate
- P22 where more than one contractor is involved in a property, you coordinate their work to minimise disruption
- P23 accurately record and store details of works and instructions issued

#### **Progress maintenance operations**

*You must be able to:*

- P24 monitor start and progression of works under agreed timetables and specifications
- P25 liaise with relevant interested parties as required
- P26 identify any problems with progression (including minor delays, major delays, minor deviations from specifications and major deviations from specifications) and investigate the causes of these problems
- P27 identify remedial action which is in proportion to the likely consequences and costs involved
- P28 seek authorisation for remedial action needed to address problems
- P29 instruct contractors on remedial action and monitor its implementation
- P30 accurately record and store details of problems and remedial actions

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### Knowledge and understanding

*You need to know and understand:*

#### Respond to requests for maintenance

- K1 procedures for acknowledgement of requests for repairs
- K2 how to communicate effectively with people requesting repairs
- K3 procedures for recording requests and decisions on action
- K4 your company's responsibilities under the terms of management agreements and other documents
- K5 the warranties, guarantees and maintenance agreements which apply to aspects of managed properties
- K6 the limits of your own authority including those for finance
- K7 the circumstances in which you must seek instruction and authorisation
- K8 the basic principles of building construction and maintenance, including the building terminology used, as they relate to assessing the nature of reported problems
- K9 the principal types of problems associated with buildings, and procedures for addressing these
- K10 circumstances when it is appropriate to engage a building expert to address problems and requests for maintenance
- K11 the implications of relevant legislation, regulations, guidelines and codes of practice

#### Arrange for the maintenance of managed properties

*You need to know and understand:*

- K12 the contractors available to you
- K13 how to select contractors
- K14 how to balance quality and cost to achieve value for money
- K15 the need for contractors to have health and safety procedures and insurance cover
- K16 the types of problems which may arise during works
- K17 the actions which you might take to minimise problems
- K18 how to communicate effectively with contractors and with those likely to be affected by works
- K19 procedures for issuing instructions to contractors
- K20 the circumstances in which you would need to notify insurers
- K21 procedures for recording and storing details of works and instructions
- K22 principles and methods of effective project management, your own strengths and weaknesses in this area and where help may be sought from others
- K23 the implications of relevant legislation, regulations, guidelines and codes of practice
- K24 how to take account of the basic principles of building construction and maintenance when working with contractors

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### Progress maintenance operations

*You need to know and understand:*

- K25 procedures for monitoring works
- K26 the circumstances which require you to liaise with interested parties
- K27 how to identify and investigate problems with progress
- K28 how to identify remedial action
- K29 the circumstances in which you need authorisation for proposed remedial action
- K30 procedures for issuing instructions for remedial action
- K31 procedures for recording and storing details of problems and remedial actions
- K32 the implications of relevant legislation, regulations, guidelines and codes of practice
- K33 how to take account of the basic principles of building construction and maintenance when working with contractors

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