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### Overview

#### Who this unit is aimed at

This unit is relevant to all managers who are responsible for ensuring that properties are maintained.

#### What the unit covers

The unit is made up of three elements:

Element 1 is about responding professionally and effectively to requests for repairs

Element 2 covers the arranging of maintenance work for properties which you manage

Element 3 covers the competences required to ensure that maintenance progresses satisfactorily

# ASTRBM8

## Progress the maintenance of managed properties

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### Performance criteria

#### Respond to requests for maintenance

*You must be able to:*

- P1 you arrange routine inspections of properties to establish maintenance requirements, where necessary, and in line with organisational procedures
- P2 you identify and acknowledge **requests** for repairs from interested parties, including any arising from inspections
- P3 you seek further information relating to the types of maintenance requested and the expectations of those requesting repairs
- P4 you record and store this information for later use
- P5 you identify any responsibility which your company has under the management agreement and other relevant documents
- P6 you identify whether existing warranties, guarantees or maintenance agreements apply
- P7 you decide, within the limits of your authority, the **action** to be taken
- P8 you seek instructions and authorisation from relevant people
- P9 where responsibility for repairs lies with others, you advise them accordingly
- P10 you inform those who requested repairs of the action being taken
- P11 you accurately record your response to requests

#### Arrange for the maintenance of managed properties

*You must be able to:*

- P12 you **identify** the need for maintenance work
- P13 you 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 you make an informed **choice of contractors** to carry out maintenance
- P16 you ensure that these contractors have appropriate health and safety procedures and insurance cover
- P17 you identify foreseeable problems which may arise from the proposed works
- P18 you identify ways to minimise these problems
- P19 you **inform those who will be affected** by the works of the arrangements for works and where possible agree these arrangements
- P20 you give clear and unambiguous **instructions** to contractors at an appropriate time to allow work to commence
- P21 you notify insurers of the details of work
- P22 where more than one contractor is involved in a property, you coordinate their work to minimise disruption
- P23 you accurately record and store details of works and instructions issued

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### Progress maintenance operations

- You must be able to:*
- P24 you monitor start and progression of works under agreed timetables and specifications
  - P25 you liaise with relevant interested parties as required
  - P26 you identify any **problems with progression** and investigate the causes of these problems
  - P27 you identify remedial action which is in proportion to the likely consequences and costs involved
  - P28 you seek authorisation for remedial action needed to address problems
  - P29 you instruct contractors on remedial action and monitor its implementation
  - P30 you accurately record and store details of problems and remedial actions

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## Progress the maintenance of managed properties

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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
- 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 the maintenance of managed properties

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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 circumstance 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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## Progress the maintenance of managed properties

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### Additional Information

#### Scope/range

#### Respond to requests for maintenance

You must deal with **requests** relating to all of the following:

1. emergencies
2. non-urgent matters
3. matters that are your company's responsibility
4. matters that are not your company's responsibility

You must take decisions on all the following types of **action**:

5. instructing contractors or site staff
6. organising inspection of properties
7. seeking authorisation of works
8. taking no action at this time
9. advising that responsibility lies elsewhere
10. advising insurers

You must also show that you have the knowledge and understanding stated in this element.

#### Notes

Requests may relate to problems with security of properties.

Interested parties may include:

11. colleagues
12. service charge payers
13. freeholders
14. owners/residents of neighbouring properties

Relevant people from whom to seek instructions may include:

15. colleagues
16. service charge payers
17. freeholders
18. owners/residents of neighbouring properties

Relevant documentation may include:

19. leases/deeds of conditions/title conditions
20. contracts with suppliers
21. legislation
22. codes of practice

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## Progress the maintenance of managed properties

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In Scotland, managers will need to understand the implications of the common law of tenement

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

### **Arrange for the maintenance of managed properties**

You must **identify** the need for maintenance based upon:

23. requests for repairs
24. problems identified by you or your colleagues
25. maintenance programmes

You must identify the need for following types of **maintenance** works:

26. maintenance or replacement of appliances
27. regular or routine maintenance
28. emergency or non-routine maintenance
29. redecoration programmes
30. building repairs

Your **choice of contractors** must be based upon the following criteria:

31. nature of the works
32. list of approved contractors and suppliers
33. available funds
34. value for money
35. existing warranties, guarantees or maintenance agreements

You must **inform those who will be affected** of all the following aspects of works:

36. timing of works
37. arrangements for access and security
38. ways of minimising foreseeable problems

You must **issue instructions** which include all of the following:

39. clear specifications for works
40. details of access and security arrangements
41. health and safety requirements
42. ways of minimising foreseeable problems
43. agreed timescales for works and monitoring
44. agreed budgets for works
45. agreed arrangements for future communication

You must also show that you have the knowledge and understanding stated in this element.

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## Progress the maintenance of managed properties

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### Notes

Maintenance may include property security.

People affected by works may include:

46. service charge payers
47. freeholders
48. insurance companies
49. colleagues
50. neighbours

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

### **Progress maintenance operations**

You must identify and deal with all of the following types of **problems with** progression:

51. minor delays
52. major delays
53. minor deviations from specifications
54. major deviations from specifications

You must also show that you have the knowledge and understanding stated in this element.

### Notes

Monitoring of project start and progression may be via an appointed agent in some circumstances

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

55. company policy
56. management agreements
57. legislation
58. codes of practice
59. insurance requirements etc.

Interested parties may include:

60. service charge payers
61. owners
62. site staff
63. insurers
64. service providers



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## Progress the maintenance of managed properties

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65. colleagues

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

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**Relevant occupations** Managers and Senior Officials; Retail and commercial enterprise; Service enterprises; Managers and Proprietors In Other Services

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**Suite** Residential Block Management

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