

Cyclical and planned maintenance

Policy

1. Introduction

1.1 This policy outlines Papworth Trust's (PT) intent to continuously improve the condition of its housing stock by producing and implementing a planned programme of refurbishment and improvement. This policy will also address the general cyclical works approach to homes, gardens and estates owned and/or managed by PT.

This policy aims to:

- Identify short and long term maintenance plans in line with the Estate and Homes Inspection Policy and Stock Condition Surveys
- Plan financial provision for maintenance and improvement works
- Optimise the proportion of repairs spending on planned maintenance
- Achieve a high level of resident satisfaction
- Ensure stock assets are in a satisfactory and lettable condition in line with the PT Lettable Standard.
- Secure long term value for money.
- Adhere to our Asset Management Strategy and regulatory requirements

1.2 PT will maintain the components of its stock by carrying out maintenance work on a cyclical basis.

1.3 PT will undertake an annual 20% rolling stock condition survey (SCS), the results, along with Estate and Home Inspections (EHI) being used to inform investment decisions. PT may choose to vary the annual % SCS carried out as long as doing so would not cause detrimental impact to the quality and accuracy of the data held.

1.4 The information gathered will be reviewed periodically to determine if a full stock condition survey update is required.

2. Planned maintenance programme

2.1 From the results of the SCS and EHI PT will formulate and implement an ongoing Planned Maintenance Programme. This programme identifies short and long term investment needs will inform the Business Plan.

The programmes are based on the following information in no particular order:

- An analysis of the stock condition database
- Validation surveys and inspections
- Identification of major component parts and lifecycles
- Known estimated life of component parts
- Meeting the Decent Homes Standards, Sustainability and Affordable Warmth considerations
- Any planned stock disposals or changes of building use
- Changes in legislation with regard to:
 - Construction methods
 - Health & safety requirements
 - Energy efficiency obligations
- Increasing incidence of responsive repairs
- Feedback from tenant consultations
- Results of EHI's
- Experience of other bodies/organisations

2.2 Works will be prioritised by:

- Ability to let the stock
- Condition of the stock
- Financial position
- Component life data
- Needs of the tenant
- Logical sequence of operations/access
- Energy and environmental considerations

2.3 Works will be grouped together, by location where practicable, to formulate long-term partnering agreements or tenders which will ensure that PT manages programmed works strategically and achieves best value. (Some works may be carried out internally by the Direct Labour Organisation (DLO)).

2.4 These works include:

- Kitchen and Bathroom refurbishment / replacements
- Heating systems
- Window and door replacements
- Electrical re-wires
- Energy Efficiency or environmental measures
- Roof and chimney works

- Service replacement (lifts, door entry, warden call, telecom)
- Door Entry replacements and new installations
- Fascias, soffits and rain water goods replacement
- Paths/Driveways
- Boundary fences

2.5 The planned maintenance approach adopted by PT is to provide financial forecasts for replacement of items in accordance with the requirements of the Decent Homes Standard. This takes account of a minimum life before renewal/replacement and condition.

3. Decent homes

3.1 PT will use the standard and the recommended maximum component lifecycles as the benchmark for formulating annual planned maintenance programmes. To be defined as 'decent', a home must meet each of the following criteria:

- Criterion 1: It meets the current statutory minimum standard for housing Dwellings which fail to meet this criterion are those containing one or more hazards assessed as serious (cat 1) under HHSRS (Home Health & Safety Rating System).
- Criterion 2: It is in a reasonable state of repair Homes which fail to meet this criterion are those where either:
 - one or more of the key building components are old and, because of their condition, need replacing or major repair; or
 - two or more of the other building components are old and, because of their condition, need replacing or major repair.
- Criterion 3: It has reasonably modern facilities and services Dwellings (homes) which fail to meet this criterion are those which lack three or more of the following:
 - a reasonably modern kitchen (20 years old or less); a kitchen with adequate space and layout;
 - a reasonably modern bathroom (30 years old or less);
 - an appropriately located bathroom and WC;
 - adequate insulation against external noise (where external noise is a problem);
 - adequate size and layout of common areas for blocks of flats.
- Criterion 4: It provides a reasonable degree of thermal comfort This means that the dwelling must have both effective insulation and efficient heating. A property must have a SAP rating of 35 or more.

4. Cyclical maintenance programmes

4.1 Cyclical maintenance is carried out at pre-determined intervals which are set depending upon the requirements of the particular aspect of work. Work may be carried out by PT or by one of PT's sub-contractors.

4.2 The intervals for cyclical maintenance are as follows:

Area of maintenance	Frequency
Gas boiler servicing and safety check	Annual
Oil boiler servicing	Annual
Electrical testing domestic - Fixed wired	5 yearly
Electrical testing HMO - Fixed wired	5 yearly
Electrical testing – Portable Appliances – for communal areas only where PT have provided the equipment	Annually or in line with current ACOP/HSE guidance
Emergency light testing (thorough test)	Twice yearly
External painting and repairs	7 yearly
Internal decoration & communal areas	7 yearly
Garages repair and painting	7 yearly
Lifts	2-4 visits per year
LOLER inspections	2 visits per year
Warden call and door entry servicing	Annual
Fire alarm	2 per year
Mechanical entrance doors	Annual
Legionella risk assessment – communal areas	2 yearly
Solar PV without remote monitoring	Annual
Solar PV with remote monitoring	5 yearly
Solar thermal Visual inspection	Annual
Solar thermal Full service	5 yearly
Air Source / Exhaust Air Source Heat Pumps	As per manufacturers guidance
Mechanical Ventilation with Heat Recovery	Annual
Electric Boilers	Annual
Fire Risk Assessments - communal areas	Annual review
Extract ventilation fans	Annual
Positive Air Pressure Input Systems	Annual
Specialist baths	Annually
Hoists	2 per year
Septic Tanks	Dependent on capacity
Pump Stations	1-2 visits per annum depending
Gutter cleaning/clearance	Annual dependent on type and location

Pressurised systems	Annually or as manufactures guidance
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While the above provides a guide to the frequency of cyclical maintenance activities, local conditions, the manufacturers' guidance, current legislation and any Approved Code of Practice or Health and Safety Executive Guidance will determine the precise frequency.

4.3 In the case of communal areas and combined external elements, the consultation process will be followed for any leaseholders in the block in accordance with the prevailing guidance/regulations at the time.

4.4 PT's aim is to optimise the proportion of repairs spending, so that a split of 70/30 in favour of planned/cyclical works is achieved. However, because the level of responsive repairs cannot be predicted a level of flexibility is required.

5. Grounds maintenance

5.1 Grounds maintenance is undertaken at properties which have communal garden/outside areas or on other agreed properties when the cost is passed back to the relevant tenants via a service charge or other appropriate charge.

5.2 Grounds maintenance can include, dependent on the particular property:

- Grass cutting
- Gravel spraying (to prevent vegetation growth on gravel areas)
- Hedge cutting
- Bush cutting
- Tree pruning
- Weeding
- Collection of litter where it has been left by 3rd parties or blown onto the property
- Jet washing paths

It does not include care of plants, repair of garden furniture, care of any bushes, hedges, trees planted by the tenants.

5.3 Garden maintenance required due to misuse, or events which tenants have organised and which have increased the requirement for grounds maintenance, will incur an additional charge to the relevant tenants for the additional grounds maintenance requirements

5.4 The intervals for grounds maintenance can vary dependent on need but the general cycles are as follows:

Area of maintenance	Frequency
Grass cutting May-September	Every other week
Grass cutting April and October	Once per month
Grass Cutting November to March	None
Bush and hedge cutting/pruning	Once or twice yearly based on need
Tree pruning (tree inspections are carried out as part of Estate Inspections)	Once yearly if required usually Nov-March
Weeding May- September (where PT have responsibility)	As required but no more than monthly
Weeding April and October (where PT have responsibility)	Once per month
Weeding November to March	None
Gravel spraying	As required but no more than 3 times per annum
Collection of litter and leaves	As part of any visit by grounds maintenance team
Jet washing	As required but no more than once per year

While the above provides a guide to the frequency of grounds maintenance activities local conditions will determine the precise frequency.

6. Communal cleaning

6.1 Cleaning is undertaken at properties where PT has a contractual obligation to do so. Usually these have communal inside areas and the cost is passed back to the relevant tenants via a service charge or other appropriate charge.

6.2 Cleaning can include, dependent on the property:

- Vacuuming
- Bathroom/toilet cleaning
- Kitchen cleaning – general surfaces and sink
- Oven cleaning
- Fridge/freezer clean
- Hob clean
- Mopping floors
- Dusting
- Window Cleaning – inside and/or outside

It does not include tenants own equipment, tenants own demised space.

6.3 Cleaning required due to misuse, or events which tenants have organised and which have increased the requirement for cleaning, will incur an additional charge to the relevant tenants for the additional cleaning requirements

6.4 The intervals for cleaning will depend on the nature of the space and its' use. General cycles are shown below.

Area of cleaning	Frequency
Corridors	Monthly
Bathing facilities	Monthly
Kitchen sideboards and sinks	Monthly
Oven	Twice a year
Hob	Twice a year
Fridge/freezer	Twice a year
Mopping	Monthly
Dusting	Quarterly
Inside windows	Once annually
Outside windows	Once 6 monthly

While the above provides a guide to the frequency of cleaning activities local conditions will determine the precise frequency. It may be that a deep clean is carried out periodically only. Estate Inspections will pick up any concerns on frequencies for individual sites.

7. Tenant input and satisfaction

7.1 PT will seek to achieve high levels of tenant satisfaction which will be monitored and reported. Where required, PT will seek the views of tenants to provide input into the core programmes of work. All processes will adhere to the Equality and Diversity policy.

7.2 Through tenant consultations / home visits, or when appropriate 'road shows', tenants will be offered choices in relation to the design / colour scheme of their internal environment where this is possible.

7.3 Decanting of tenants to enable work to be completed will only take place where absolutely necessary.

8. Environmental and Government targets

8.1 PT will work with its tenants and Government to work towards zero net carbon by 2050.

8.2 PT will work towards a SAP rating of 70 in its homes by 2030.

8.3 SAP/EPC ratings can be found online at <https://www.epcregister.com>. Documents found online may not be accurate if works have recently been carried out to properties that may have affected the SAP rating. SAP is the Standard Assessment Procedure approved by the government for assessing the energy performance of house or home. To get a SAP rating the home will need to be assessed by an assessor who is accredited and registered with a certification body.

The calculations that produce the SAP rating take in to account how the home is built, including the insulation, which heating systems are used, the lighting, renewable technologies that could be used and gains from the sun (solar gains).

The EPC or Energy Performance Certificate is a document that is required for all new homes (including self-builds), and for any new home that is being sold or let. The EPC uses the SAP rating to provide an energy performance scale from A to G, where A is the most efficient.

8.4. These works will be funded by the annual capital programme where possible or from successful external bids or partnerships where the expected value of works is significant and would affect PT's ability to successfully deliver the rest of its planned maintenance programme.

9. Contract management procedures

9.1 All contracts will be managed using best practice and methods as published by the Royal Institute of Chartered Surveyors (RICS). All tendered contracts will be awarded under the JCT suite of standard building contracts or if procured via a framework the suitable framework contract.

9.2 All contractors will be required to agree to the PT standard terms and conditions on becoming an approved. This includes a Code of Conduct for working in tenants homes.

9.3 Periodic meetings to suit the work being completed will take place between contractual parties to monitor performance and best value.

9.4 All works completed in properties will be recorded on the relevant property file and stock database.

10. Acts, Events or Occurrences beyond organizational control

Circumstances may arise where there are Acts, Events or Occurrences beyond the control of Papworth Trust. Examples of this include civil unrest, war, pandemics, natural disasters etc. In these situations guidance will be sought from the directing body at that time e.g. local authorities, central government, military. Papworth Trust will adhere to any changes that are administered which may lead to short, medium or longer term changes to this policy and timescales.

In these circumstances we will communicate changes by our website.

11. Other relevant documents and policies

This policy should be read in conjunction with the Asset Management Strategy, Corporate Plan, Estate and Homes Inspection Policy, Repairs Policy, Rechargeable Repairs Policy and other relevant Policies.

12. Document control

Author	Senior Business Manager, Property Maintenance
Input from	Tenant Scrutiny Panel
Approvers	Regional Operations Manager
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13. Version tracker

Version number	Date	Comments/Reason for issue
1.0	Nov 2017	New policy
2.0	Sept 2020	Revised policy and input from Scrutiny Panel