



PLANNED MAINTENANCE AND IMPROVEMENT POLICY 2024

1.0 INTRODUCTION

The Association's Corporate Goal is:

To build and maintain affordable, energy efficient, good quality homes whilst protecting the long term viability of the Association

Supporting this goal, we have the objectives of:

- ✓ Investing in our existing housing stock to ensure that the Association provides the highest standard of accommodation possible; and
- ✓ Providing a range of quality housing and maintenance services to tenants and other customers.

We aim to provide an efficient and effective property maintenance and improvement service to tenants which:

- ✓ Maintains all the Association's stock to a standard that meets our obligations as set out in the Scottish Secure Tenancy Agreement;
- ✓ Meets the Scottish Housing Quality Standard and the Energy Efficiency Standard for Social Housing (where it is technically feasible and affordable to do so);
- ✓ Meets the Energy Efficiency Standard for Social Housing (EESH2) milestone of EPC Band B by 2032 (within the limits of cost, technology and necessary content);
- ✓ Maximises the lifespan of and ability to let our properties;
- ✓ Achieves high levels of tenant satisfaction with the quality of their homes;
- ✓ Carries out planned replacement and improvements when they are required;
- ✓ Gives tenants and other customers reasonable choices about when work is done;
- ✓ Maintains common areas and neighbourhoods to a good standard where tenants and other users feel safe.

2.0 GUIDANCE AND LEGAL CONTEXT

The Association will maintain its housing stock in line with legal requirements and in accordance with the responsibility for repairs set out in the Scottish Secure Tenancy Agreement.

The Scottish Housing Quality Standard (SHQS) is the Scottish Government's principal measure of housing quality in Scotland. The SHQS is a set of five broad housing criteria which must all be met if the property is to pass SHQS.

These criteria comprise of 55 elements and nine sub-elements against which properties are measured.

The Energy Efficiency Standard for Social Housing required Social Landlords to improve the Energy Efficiency of their homes such that all properties (where it is

technically feasible and financially viable to do so) complied with the standard by December 2020.

The Energy Efficiency Standard for Social Housing was revised in 2020 with a new milestone of 2032 for EESSH 2, where all social housing meets, or can be treated as meeting, EPC Band B (Energy Efficiency rating), or is as energy efficient as possible, by the end of December 2032 and within the limits of cost, technology and necessary consent. Furthermore, guidance now states that if a property fails EESSH, it cannot meet SHQS.

Each year, as part of its budget setting process, the Association shall make provision for investment to maintain its housing stock at, or in excess of the SHQS, EESSH and EESSH2, where properties are anticipated to fall below the minimum requirements of each in the coming financial year.

3.0 CATEGORIES

Planned Maintenance and Improvement activities are separated into the following categories for management purposes:

Cyclical Maintenance

Describes maintenance tasks which are pre-programmed or carried out on a periodic and recurring basis to ensure the proper functioning of a component or installation, or to extend or protect a component or installation that is subject to cumulative wear and tear; e.g. gutter cleaning, central heating servicing, external painter work, emergency light testing and electrical safety inspections etc.

Planned Maintenance and Major Repairs:

Describes maintenance which deals with the expiry, failure or obsolescence of major components on a programmed basis e.g. the replacement of roof coverings, renewal of kitchen fittings, bathroom suites, and central heating boilers. This also includes maintenance of areas owned by the Association outside the home such as common areas and landscaping, car parks, footpaths etc.

Improvements:

This refers to the improvements, alteration or addition to the property. This can include the provision of new features or the replacement of existing components with elements of a significantly higher standard than at the time of initial installation. These improvements add to the amenity of the property.

Improvements can also be undertaken to the environment.

4.0 FUNDING

The Association will ensure that adequate provision is made for funding the planned maintenance and improvement programme. The financial position will be monitored by using the annual budget, five year and 30-year financial plans.

5.0 LIFE CYCLE COSTING

In order to make financial provision for the Association's planned maintenance and improvement programmes, life cycle costs shall be prepared for each new build and refurbishment project at completion, using information from recent contracts and

standard life cycle intervals. The life cycle intervals shall form the basis of the Association's programmes.

6.0 STOCK CONDITION SURVEYS

The Association continually carries out a rolling programme of condition surveys across all of its stock through which we can maintain a constant review of our short, medium and long term obligations, particularly in relation to maintaining the Scottish Housing Quality Standard (SHQS), Energy Efficiency Standard for Social Housing (EESH and EESH 2) and our planned and cyclical maintenance programs for 30 years.

To inform and update the planned maintenance/improvement programme, stock condition surveys shall be carried out on a sample of the Association's stock. The focus of stock condition surveys shall be on the coming years proposed investment, to enable informed decisions to be made as to where proposed investment shall proceed and enable the finalisation of specifications for proposed works.

Each year, the Association shall commission sufficient Emergency Performance inspections as to allow the assessment of compliance with EESH / EESH2 and enable investment to be targeted at non-complaint properties or house types.

7.0 PROCUREMENT OF PLANNED MAINTENANCE AND IMPROVEMENT SERVICES

The procurement of services in relation to the planned maintenance function shall be undertaken in accordance with the Association's Corporate Procurement Policy.

Prior to each the commencement of the financial year, the Director of Property Services shall prepare, for the approval of the Customer Services Committee, a proposed Procurement Statement setting out all the procurement, regulated and non-regulated, including appointment of consultants that has taken place, for the Board of Management to consider, demonstrating the procurement route for each project undertaken..

In accordance with the Corporate Procurement Policy the Association will ensure that value for money is a key objective during the procurement process with the aim of achieving best value for the Association. Best value will be achieved by procuring at the lowest price possible without compromising quality, performance or reliability. The Association may not, therefore, consider that the lowest priced tender offers best value.

The Association aims to complete all procurement, regulated and not regulated, not later than February for the forthcoming financial year, enabling budget allocations to be made on the basis of actual, rather than estimated figures.

Where a contractor is appointed, the Association and contractor shall enter into an appropriate form of Agreement.

8.0 TENANT CONSULTATION

The Association will advise and, where appropriate, consult tenants on forthcoming programmes. Opportunities for tenants' choices will be offered where possible for contracts.

9.0 QUALITY CONTROL

The Association will monitor the performance of contractors and external consultants and will undertake regular inspections during the course of contracts to ensure work is carried out to specification.

10.0 DECORATION ALLOWANCE AND DECANT COSTS

Decant Costs and decoration vouchers shall be given, where appropriate, in accordance with the Association's Decant and Customer Payment Policies.

11.0 REPORTING REQUIREMENTS

The Association's Customer Services Committee shall monitor the planned and cyclical maintenance service by means of a written report presented each quarter indicating the financial and practical status of each project within the programme, the quality of work and tenant satisfaction, including:

- ✓ Location of Works;
- ✓ Description of works;
- ✓ Number of properties included (including any non-Association property);
- ✓ Status of project;
- ✓ Timetable for project (planned);
- ✓ Timetable for project (achieved);
- ✓ Budget sum for project (including fees);
- ✓ Tender sum for project;
- ✓ % Practical completion (with reasons for variation from programme);
- ✓ % Expenditure (with reasons for variation);
- ✓ Assessment of contractor performance;
- ✓ Assessment of tenant satisfaction.

12.0 HEALTH AND SAFETY

The Association is committed to a policy of ensuring the highest standards of health, safety and welfare are maintained on all projects undertaken by them.

Planned maintenance contracts shall be undertaken in accordance with the Association's various Landlord Safety Manual Health & Safety Policies.

Waste generated and arising on site will be managed in accordance with the Association's Waste Management (LSM) Policy.

13.0 EQUAL OPPORTUNITIES

Within all regulated and unregulated procurement, the contractor's commitment to equal opportunities shall be assessed prior to appointment.

14.0 REVIEW OF POLICY

This policy shall be reviewed at least every 3 years.

April 2024

Policy Review Consultation Process

Considered by the Senior Management Team	4 th April 2024
Recommended for Approval by the Customer Services Committee	11 th April 2024
APPROVED BY THE BOARD OF MANAGEMENT	25th APRIL 2024
Date of Next Review	April 2027

Approved