



Planned Maintenance & Major Works Policy

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Prepared By

Document Owner(s)
Home Services Director
Planned Maintenance & Asset Manager

Manual Control Version

Version	Date	Author	Change Description
1.0	January 2019	Property Services Director	
1.1	May 2022	Property Services Director & Home Services Director	<ul style="list-style-type: none"> • Changed title from Component Replacement Works Policy • Updated policy date period, ownership of policy and job titles • Included balance of customer needs with asset requirements, and communication plan • Included asset life spans • Included 'in-year' replacement approach and tolerances • Included reporting processes

1.2	March 2025	Planned Maintenance & Asset Manager	<ul style="list-style-type: none"> • Removal of term 'Assets Team' • New role title for Asset & Development Manager • Change of document ownership from Home Services Director to Planned Maintenance & Asset Manager • Implementation of new pre-survey approach in section 3.0. • Location of contract durations and renewals. • Removal of specific Asset Management System to open opportunity to review without altering policy. • Contractor communication, procurement & project monitoring. • Specifics of client/contractor meetings and how they can take form. • Amendment to show how KPIs are reported to SLT. • Post Inspection process and documentation, including timescales. • Addition of Major Works to title. • Inclusion of EDI section and subsequent EI
1.3	October 2025	Planned Maintenance & Asset Manager	<ul style="list-style-type: none"> • Remove annual list of works detail • Detailed customer journey trial • Pre and post satisfaction surveys • In line with financial guidelines reference • Equality inclusion • Policy responsibilities and updated review/approvals • Added detail for pre and post work surveys •

Planned Maintenance Policy

1.0 Introduction

- 1.1 This Policy relates to all planned replacement programmed works, including the replacement of fixtures, fittings and building components either in bulk or individual project work.
- 1.2 Planned works programmes are supported by the Stock Condition Survey information held in PFH’s Asset Management System.
- 1.3 This policy is supported by the Procurement Strategy, Policy and Procedures which details contract durations and renewal timescales. This information is also made available via the contractor portal.

2.0 Property Selection

- 2.1 Each financial year a series of planned replacement works are identified for completion by the Asset management plan. The properties which are selected reflect the component lifespan and the condition in accordance with the Decent Homes standard as well as using resident insight to balance ‘wants and needs’ with the component lifespan where possible. Where not possible, priority will be given to the asset requirements based upon the criteria within this policy.
- 2.2 A list of assumed replacements is communicated to Residents for information purposes, taking account of at least 5 years of improvements. These dates of replacement are indicative due to the nature and lifespan of the component, wear and tear, changes in legislation and financial budget available at the time. Residents are made aware of the impending programme at survey stage and by the contractor at least one month prior to the works commencing. Planned maintenance programme spanning the next 5 years will be publicised and shared with residents
- 2.3 Asset lifespans used for PFH’s Capital Programme are:

Windows	30 Years
Roof	80-110 Years
Kitchens	20 Years
Bathrooms	30 Years
Boilers	15 Years
Structure	30 – 120 Years
PV Solar Panels	25 Years
Lifts	30 Years

3.0 Specifying the works

- 3.1 The Planned Maintenance & Asset Manager creates a list of component replacement works for the upcoming financial year, during the third quarter of the previous financial year, following analysis of the asset management database. This list of properties is then provided to the relevant area surveyor(s) in the fourth quarter, to carry out pre-surveys of the properties, determining the works required and to corroborate the database for accuracy. This limits any delays to the start of component replacement works in the new financial year.

- 3.2 The Planned Maintenance & Asset Manager uses stock condition and financial information, alongside resident feedback to produce a fully costed forward looking maintenance programme. The Business Services Director incorporates this into the business plan and annual budget to be approved by the Board. Following board approval, a programme of works is initiated.
- 3.3 Once the budget for each category is approved, communication is opened with the relevant contractor(s) who shall be carrying out the works. Contractors are often procured and contracted through a procurement framework that encompasses the renewal of components. However, if there is no contractor under contract to carry out component replacements specifically, a tender process shall be carried out to confirm that the association is getting good value for money and complies with PFH's Procurement Policy and the Procurement Act 2023, where applicable.
- 3.4 The programme should allow for ad-hoc approval of additional in-year replacements that occur by default, or are required due to changes in legislation etc. A 10% to 20% margin is within tolerance and should be reviewed in quarter 3 to accelerate the use of the unallocated budget on items identified in the asset system.

4.0 Contracts

- 4.1 The procurement of each contract is subject to value, duration, complexity and size. Framework contracts are used traditionally for replacement works which can extend over a number of years in accordance with procurement rules. However, individual projects can be tendered to provide one off contracts. The decision process is based on the PFH Procurement Policy. Please refer back to 3.3.

5.0 Contract supervision

- 5.1 Upon awarding the contract the Planned Maintenance & Asset Manager will arrange for the residents affected by the programme of works to be informed, confirm access arrangements and provide the specific Contractors details. Communication should take the form of a written letter for retention by the resident and also if required, utilise the option for digital communication through that of PFH Connect tablets. We will also trial a 'what to expect' customer journey leaflet; detailing the process of the works being undertaken and estimated timescale.
- 5.2 The contractor shall visit the residents before the works are due to start on their property and comply with all the relevant contract conditions.
- 5.3 The Planned Maintenance & Asset Manager shall ensure that the works are kept under supervision and ensure that regular inspections of the work in progress are carried out personally or by one of the property surveyors. Any problems identified shall be reported to the contractor in writing and discussed in regular contractor management meetings. If the contractor awarded the works also has existing contractual commitments to PFH, contractor meetings can be held in a dual subject format to encompass all discussions. The specific Terms and Conditions of the Contract shall be adhered to and supersede all other requirements.
- 5.4 KPI s will be set prior to commencement and form part the contract conditions.

5.5 Contract meetings will be set and a relevant agenda for managing the contract specifics and conditions provided by the client. Refer back to point 5.3.

6.0 Pre Inspections

6.1 The main purpose of pre-inspections is to:

- Ascertain the accuracy of our data and determine the condition of the current component and its need for replacement
- Ensure value for money through accurate specifying of the repair
- To diagnose complex issues that need clear explanation and sometimes investigation
- Health and Safety Issues that may arise
- Investigations of complaints raised
- Where additional work may be required to be specified

6.2 Appointments with residents for pre inspections should be made with the resident in mind, and the use of flex where and when this can be adopted, to expedite good time management there may be occasions where an Surveyor/Officer are close by and may call unannounced to try and resolve the issue, if this is a case then the visit or call will be followed up by

A) checking the Resident is available and happy for the inspection to take place,

B) identification of PFH staff card or verification of identification is given by PFH office.

C) Other methods may be adopted such as passwords and PFH will always try and accommodate if flex is required, such as by providing a female member of staff if requested.

6.3 Contract meetings will be set and a relevant agenda for managing the contract specifics and conditions provided by the client. Refer back to point 5.3.

7.0 Post Inspections

7.1 100% Post-inspections are carried out by a PFH Surveyor to ensure: -

- Repairs are carried out on the performance, quality standards and timescales set out by the association.
- That the work actually carried out tallies with the works ordered and invoiced for and that value for money has been obtained.
- Compliance with relevant professional, statutory and health and safety requirements (such as checking for appropriate fire stopping compliance).
- Resident satisfaction.
- Evidence gathering where there is a legal dispute
- Complaints, investigations and gathering statements.

7.2 Post inspections for Planned Works shall take place within 4 weeks of completion of works (unless otherwise agreed)

- 7.3 Post inspections shall be arranged via a letter sent to the residents, giving them an AM or PM appointment. These will be completed by the area surveyor and/or the Planned Maintenance Manager

8.0 Contract payments

- 8.1 Invoices shall be reviewed by the Property Services Administration Team and escalated to the Planned Maintenance & Asset Manager if estimated costs do not align. Where costs are accurate alongside the original order estimate, or otherwise within tolerances, invoices can be processed in line with Financial Regulations guidance.
- 8.2 Payment terms should be met that reflect the contract conditions and in accordance with PFH terms of agreement.
- 8.3 Additional items, amendments to the contract, omissions or variations shall be approved prior to any works commencing. The contract terms shall apply to variations.

9.0 Confirmed work schedules

- 9.1 If property lists are provided to the contractor, confirmation of the actual work on site will be required. This is subject to the relevant schedule of rate being applied or the contractor's actual works costs which may differ from property to property.

9.0 Quality standards

- 9.1 The Quality standard of works shall be in accordance with the relevant code of practice, any specification provided by PFH or acting agent and good practice trades guild guidance.
- 9.2 A benchmark for the Quality of workmanship shall be provided for reference throughout the contract period. This will take the form of a sample of works or product placement at the commencement of the Contract.
- 8.3 The progress of all relevant programmes shall be reported to the Home Services Director on a monthly basis via documented KPI reporting, noting progress and costs. This shall also be reported and discussed at monthly Home Services directorate meetings. Following directorate meetings and review of KPI reports, the Home Services Director shall report to SLT colleagues.

9.0 Review

- 9.1 The policy will be reviewed every three years by the SLT, or sooner if there is a change in regulation, legislation, or codes of practice.

10.0 Equality, Diversity & Inclusion

- 10.1 An Equality Impact Assessment shall be conducted and provided as an appendix to this document. PFH remain committed to equality, diversity and inclusion for all associated with Planned Maintenance and wider association works and activities. Contractors and Partners are expected to abide by the associations EDI policy and

any amendments made shall be communicate to relevant parties.

PFH continue to understand its residents with regular data gathering to ensure that resident information, needs and relevant adjustments are accounted and accommodated for.

- 10.2 PFH seeks to ensure that our actions do not lead to unlawful discrimination. Deliberate acts of discrimination, including victimisation, harassment, instruction, or pressure to discriminate, will result in disciplinary actions and/or termination of contracts with external agents.
- 10.3 We can provide access to interpreters for minority languages including sign language, and we can arrange written material in large print, Braille and first languages where necessary.
- 10.4 PFH will aim to ensure that no individual or group is treated less favourably on the grounds of age, disability, gender, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief, sex and sexual orientation. We aim to recognise the needs of individuals and treat each person through the complaints process with dignity and respect.
- 10.5 We will consider the individual needs of residents who may require additional support and make reasonable adjustments in line with the Equality Act 2010 and in accordance with our EDI Policy.
- 10.6 We will work with our contractors to ensure that any resident who feels uncomfortable with male only operatives within a domestic dwelling, either can opt to have a female operative, or a female accompanying the operative.

11. Responsibilities within this Policy

PFH Board

The Board has responsibility for approving this policy in the first instance, any major revisions and gaining assurance from the Leadership Team that it is being delivered effectively.

Chief Executive & Leadership Team

The Chief Executive and SLT have ultimate accountability in ensuring the policy is delivered and will approve any minor amendments or revisions of PFH's Planned Maintenance Policy.

Home Services Director

Responsibility for implementation of the Planned Maintenance Policy falls to the Home Services Director.

Planned Maintenance and Asset Manager

The Planned Maintenance programme will be managed by the Planned Maintenance and Asset Manager, who will also undertake regular reviews of the Policy, ensuring compliance with current legislation and regulatory requirements.

Competent Contractors

Responsible for the operational delivery of maintenance programmes. Contractors and their engineers must hold appropriate qualifications.