



Planned & Cyclical Maintenance Policy

Status: Approved

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Date Approved:	Feb-24
Approved By :	BHA Board
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Regulatory / Legislative Considerations/ References	
Other Documents to be read in conjunction with this policy :	<ul style="list-style-type: none">• Asset Management Strategy• Procurement Policy• Sustainability Policy

Policy Title:	Planned & Cyclical Maintenance Policy
Purpose / Aim of policy:	To set out our approach to planned and cyclical maintenance of BHA homes to assist with the future sustainability of the association.
Scope of Policy:	The Planned and Cyclical programmes
Definitions:	<p><u>Cyclical Maintenance</u> – is the regular servicing or works to elements (painting) to avoid large repairs in future.</p> <p><u>Planned Maintenance</u> - relates to component replacement works (boiler/ roof/ windows) etc. in a programmed manner to achieve value for money.</p>
Specific detail related to each strand in the scope:	Not applicable
Approval Source:	BHA Board
Equality Impact Assessment:	None required
Glossary of Terms	None
Risk Implications:	<p>Failure to effectively design and implement our planned and cyclical programmes could result in monies being directed incorrectly resulting in a lack of effective use of our limited resources.</p> <p>Whilst asset planning is not an exact science effort should be made to ensure transparency around our decision making.</p>

1.0 INTRODUCTION

1.1 This policy sets out the key objectives for the planned and cyclical maintenance of BHAs homes, for the future sustainability of the Association and the benefits to our customers and to the links with the Business Plan and Asset Management Strategy.

2.0 SCOPE OF POLICY

2.1 The objectives of the Planned and Cyclical Maintenance policy are to:

- Provide safe, warm, comfortable affordable homes and a healthy living environment, where people want to live;
- Maintain long term sustainability and successful occupancy of our homes and ensure the long-term viability of the Association;
- Achieve value for money in procurement, in line with our Procurement Policy;
- Ensure all compliance requirements are met to ensure our customers' homes are safe and our colleagues and contractors can work safely in maintaining these homes;
- Ensure compliance with any general property standards such as the Scottish Housing Quality Standard etc.
- Have effective systems in place for monitoring, recording, and reporting on asset management data. This underpins the framework for planning investment programmes and the financial planning process in respect of assets;
- Provide our customers with current information on investment in their home and how this will impact on them;
- Enable the Board to be assured of the due control over maintenance, compliance, and asset investment activities.

3. DEFINITION OF PLANNED MAINTENANCE

3.1 Planned Maintenance is the structured planning of replacement components in our homes, taking account of the expected life of the component, and the replacement costs, to inform the long-term investment needs for our property assets and informs our Business Plan, and forms the basis of Planned Maintenance Delivery Plans.

3.2 The 30-year investment plan based on these elemental useful lifecycles informs the long-term investment needs.

3.3 These investment plans are a core element of the Asset Management strategy and the framework for informing future investment.

4. DEFINITION OF CYCLICAL MAINTENANCE

- 4.1 Cyclical maintenance is the inspection, maintenance, and servicing on an agreed, regular cycle. The objective is to slow down the rate of decay of fabric and components, prolonging their life. It includes cyclical Health & Safety requirements for compliance. Examples are painting external timber on a 3-year cycle to prolong its life; inspecting and servicing of lifts to prolong their life and ensure they are compliant with Health & Safety legislation for lifts.

5. GENERAL PRINCIPLES

- 5.1 Future Asset Management strategies will ensure that future planned maintenance programmes of work take into account factors such as popularity of the home, designing out poor quality, obsolescence and intrinsically expensive components. This will be linked to both New Build and Repair specification and component type.
- 5.2 The Planned Maintenance and Cyclical investment programmes will be procured in line with our Procurement policy, for cost effective, value for money investment and compliance with the procurement Regulations.
- 5.3 Regulatory Standards
The key Regulatory Standard is the SHQS (Scottish Housing Quality Standard) and the Association will continue to review investment requirements to ensure homes remain at this level.
- 5.4 The EESSH (Energy Efficiency Standard in Social Housing) standard is incorporated in the SHQS and it is expected that any further standards will also be. If not, however, these will be reported on separately.
- 5.6 The cyclical compliance regimes are set by the relevant legislation for Asbestos Management, Legionella, Electrical Safety, Gas Safety, Fire Safety and Lifts. However, where there are no specific legal or regulatory requirements (and for our purposes BS Standards are included within this) then we will endeavour to adhere to all good practice.

6. THE POLICY

- 6.1 To facilitate the aims we will:
- Hold a comprehensive stock database, and will regularly survey homes to ensure the data is kept up to date;
 - Update the database when components are replaced through Planned or Cyclical programmes, through Repairs and any new build homes;
 - From the stock condition data, supplemented by local and technical knowledge develop a 30 year and 5-year Investment plan, working in partnership with the Executive Director of Business Support.

- As part of the 30 year and 5-year Plans, develop an appropriate length strategy for meeting the requirements of SHQS, EESSH and any future requirements. The Plan should, where future regulatory requirements are going to be changed but the detail is not yet known, outline any options in regard to the approach being proposed in the Plan and clearly set out the potential risks and rewards of the proposed approach against what is known.
- Ensure statutory duties in respect of health & safety are complied with, for Asbestos Management, Legionella, Electrical Safety, Gas Safety, Fire Safety and Lifts.
- Promote links across the Association and external partners to promote asset sustainability.
- Work in partnership with appropriate partners to expedite the delivery of high-quality homes;
- Maintain a high standard of specification in design of planned Maintenance and development at affordable rent levels;
- Consult with our customers on their priorities for investment in their homes.

7. RISK

7.1 Key risks arise from Planned and Cyclical Maintenance Policy:

- Failure to comply with relevant legislation resulting in possible legal action;
- Failure to comply with regulations;
- Costs exceeding budget levels;
- Rent loss from declining popularity of homes due to delaying replacing components;
- Injury to customers, colleagues and contractors, and the general public
- Early component failure

7.2 These carry the risk of health & safety breaches, higher costs, increased voids and reputational damage.

7.3 Effective management of these risks is through the management and monitoring of planned and cyclical maintenance, and the strategic and Operational Risk Registers.

7.4 Compliance, performance and budget monitoring is reported to the Board.

7.5 Adequate financial resources are in place to support the delivery of Planned and Cyclical Maintenance.

7.6 Adequate resources are in place to maintain the defined standards and to deliver the investment programmes.

8. RESPONSIBILITIES

- 8.1 The Planned and Cyclical Maintenance Policy sits with the Executive Director of Assets & Sustainability. The Asset Manager Lead has responsibility for managing the policy outputs with the Asset Managers the delivery of the planned maintenance programmes and the Compliance Manager delivery of the cyclical maintenance programmes. The Asset Data Advisor is responsible for the day-to-day maintenance of the Asset Management database.