



Planned Maintenance Policy 2025-2028

Board Approved: 12 February 2025
Next Review: February 2028

1.0 INTRODUCTION AND BACKGROUND

1.1 Scope

This policy sets out the planned and cyclical maintenance functions for Homes for Life.

Planned Maintenance meaning planned or unplanned major upgrades of property components which are recognised as Capital Expenditure.

Cyclical maintenance/ planned preventative maintenance (PPM) which aims to maximize the lifespan and efficiency of property assets or components recognised as revenue expenditure.

1.2 Vision

Homes for Life Housing Partnership (HfL) is, a small RSL with a mighty passion, committed to providing our tenants with an affordable, tailored, responsive service where HfL will deliver more than “homes for life.” HfL will achieve this by investing in our people, our properties and communities assisting them to thrive and flourish.

1.3 Values

Our values define how HfL will operate.

- Compassion
- Collaboration
- Trust, encompassing integrity and openness
- Professionalism, encompassing, respect, knowledge, and learning

1.4 Business Plan and Objectives

The HfL Business Plan 2023-2026 sets out 4 clear Objectives. Key aims to meet those objectives which directly link to this policy are shown below:

Objective 1 – Invest in our Services

- Increase overall tenant satisfaction to above 90%
- Improve repairs performance above the Scottish average for all indicators

Objective 2 – Invest in our Homes

- Reduce the volume and costs of reactive repairs
- Improve the external maintenance of homes and communal spaces
- Reduce the volume and costs of reactive repairs
- Increase tenants’ satisfaction with the management of our neighbourhoods

Objective 3 – Invest in our People

- Increase accredited learning

Objective 4 - Invest in our Future

- Ensure our rents remain affordable
- Increase the supply of new homes and rental income

- Increase the use of new energy sources and heating and construction technologies

1.5 Asset Management Strategy

The Asset Management Strategy 2022-2025 sets out the legal and regulatory framework which this policy sits within and sets out HfL approach to managing, maintaining and investing in its 305 wholly owned properties. This is due for revision and board review in 2025.

1.6 HfL Service Standards

HfL Service Standards are based on the Scottish Social Housing Charter April 2021 and set out our commitment to tenants and other service users and what tools HfL will use to measure our compliance.

1.7 Tenant Satisfaction Survey Results 2024

The response from the **2024 Tenant Satisfaction Survey** listed the top three service priorities for tenants which all strongly link to Asset Management and Repairs Performance.

10.1 Top 3 service priorities (Q28)

Respondents were asked to select their top three service priorities. Most important for tenants was delivering an effective repairs service (76%) and improving the overall quality of their home (73%). These were also the top two priorities mentioned by tenants in 2022.

Q28. Which of the following priorities for you as a tenant is the most important? Please select up to 3		
Base: All respondents, n=151	No.	%
Delivering an effective repairs service	115	76.2%
Improving the overall quality of your home	110	72.8%
Good quality landscaping, security and maintenance of common areas	40	26.5%
Fair and efficient allocation of homes	25	16.6%
Providing information and advice in relation to housing issues	21	13.9%
Dealing with anti-social behaviour	18	11.9%
Helping you keep your tenancy through the providing the right support or working with partners to help you get the right help	12	7.9%
Support and advice on claiming welfare benefits and paying rent	7	4.6%
Enforcing tenancy conditions i.e. making sure tenants adhere to their tenancy conditions	2	1.3%
Other	17	11.3%

This policy aims to ensure the services linked to these priorities are successfully delivered.

1.8 HfL Customer Promise

This policy has been created in line with HfL's Customer Promise

- To work with our Tenants Panel to develop our Customer Promise
- To provide a safe place to live
- To deliver a reliable repairs service
- To care about you
- To help communities grow
- To tell you where your money goes

- To work together with customers and partners

1.9 Linked Policies

This policy links to many HfL Governance, Maintenance and Housing policies and so must not be read in isolation.

1.9.1 Operational Policies

- Procurement Policy
- Asset Management Policy
- EVH Landlord Safety Manual
- Aids and Adaptations Policy
- Compensation for Improvement Policy
- Right to Repair
- Empty Homes Policy
- Decant Policy
- Sustainability Policy

1.9.2 Tenant Safety Policies

- Gas Safety Policy
- Electrical Safety Policy
- Asbestos Policy
- Water Safety Policy
- Fire Safety Policy
- Damp, Mould and Condensation Policy

1.9.3 Service Standards

- Equality and Diversity Policy
- Openness, Accountability and Confidentiality Policy
- Data Protection, Environmental Information Regulations and Freedom of Information Policies
- Complaints Handling Policy
- Income Management Policy
- Risk Management Strategy
- Value for Money Strategy
- SFHA Model Code of Conduct for Staff
- Contractor Code of Conduct

2.0 LEGAL AND REGULATORY FRAMEWORK

2.1 Scottish Housing Regulator best practice guide on Integrated Asset Management

HfL has used best practice guidance in creation of this policy and its practices from the Scottish Housing Regulator's recommended practice document on **Integrated Asset Management published in February 2023**.

An effective approach to integrated asset management should therefore enable social landlords to:

- Place tenants and service users at the heart of assessing asset performance and value
- Ensure that assets are fit for purpose with targeted interventions to maximise performance
- Ensure that continued investment in assets provides value for money and is fundable
- Make informed decisions on investment plans based on intelligence of asset performance
- Use evidence to produce transparent options for investing in assets
- Achieve a 'whole organisation' approach to asset management ensuring that the insight and opinions of all parts of the landlord's operations influence asset management strategy
- Enable the long-term impact of asset investment and disinvestment scenarios to be tested and understood from a business and tenant and resident perspective.

This also supports social landlords' approach to keeping tenants and residents safe. **Social landlords must ensure they meet all duties on tenant and resident safety and that they obtain appropriate assurance about their compliance with all relevant safety requirements.**

This policy also works toward achieving the following regulatory standards and outcomes contained within the Scottish Social Housing Charter and as detailed below:

2.2 Social Housing Charter Standards

- **Standard 1:** The governing body leads and directs the RSL to achieve good outcomes for its tenants and service users
- **Standard 2:** The RSL is open about and accountable for what it does. It understands and takes account of the needs and priorities of its tenants, service users and stakeholders. And its primary focus is the sustainable achievement of these priorities.
- **Standard 3:** The RSL manages its resources to ensure its financial wellbeing while maintaining rents that tenants can afford to pay.
- **Standard 4:** The governing body bases its decisions on good quality information and advice and identifies and mitigates risks to the organisations purpose.
- **Standard 5:** The RSL conducts its affairs with honesty and integrity.

- **Standard 6:** The governing body and senior officers have the skills and knowledge they need to be effective.
- **Standard 7:** The RSL ensures that any organisational changes or disposals it makes safeguard the interests of, and benefit, current and future tenants.

2.3 Social Housing Charter Outcomes

- **Outcome 3: Participation** - tenants and other customers are offered a range of opportunities that make it easy for them to participate in, and influence their landlord's decisions at a level they feel comfortable with
- **Outcome 4: Housing Quality** - tenants' homes are well maintained, with repairs and improvements carried out when required, and tenants are given reasonable choices about when work is done.
- **Outcome 5: Repairs Maintenance and Improvements** - tenants' homes are well maintained, with repairs and improvements carried out when required, and tenants are given reasonable choices about when work is done.
- **Outcome 6: Estate Management, Anti-social Behaviour, Neighbourhood Nuisance and Tenancy Disputes** - tenants and other customers live in well maintained neighbourhoods where they feel safe.
- **Outcome 11: Tenancy Sustainment** - tenants get the information they need on how to obtain support to remain in their home; and ensure suitable support is available, including services provided directly by the landlord and by other organisations.
- **Outcome 13: Value For Money** - tenants, owners and other customers receive services that provide continually improving value for the rent and other charges they pay
- **Outcome: 14/15: Rents and Service Charges** - a balance is struck between the level of services provided, the cost of the services, and how far current and prospective tenants and service users can afford them. Tenants get clear information on how rent and other money is spent, including details of any individual items of expenditure above thresholds agreed between landlords and tenants.

2.4 Scottish Housing Quality Standards (SHQS) and Energy Efficiency Standards for Social Housing (ESSH & ESSH2)

Technical guidance for social landlords relating to housing standards and reported as part of ARC compliance.

- **Annex A: must be compliant with the current tolerable standard (14 Elements)**
- **Annex B: must be free from serious disrepair**
- **Annex C: must be energy efficient (1 element)**
- **Annex D: must have modern facilities and services**
- **Annex E: must be healthy, safe and secure**
- **The Energy Efficiency Standard for Social Housing pre 2020 (ESSH)**
- **The Energy Efficiency Standard for Social Housing post 2020 (ESSH2)**

3.0 APPROACH AND METHOD

3.1 HfL Asset Management Approach to Planned Maintenance

Hold a comprehensive stock database with stock condition surveys reviewed externally on a 5 yearly rotational basis.
Update the database through when components are replaced through planned or cyclical maintenance programmes, unplanned or insurance claim or empty homes component replacements, adaptations and Repairs process.
From the stock condition data, supplemented by local and technical knowledge develop a 30 year and 5-year Investment plan to support compliance with government standards such as the Scottish Housing Quality Standard (SHQS) and the 2032 Energy Efficiency Standard for Social Housing. Review these plans on an annual basis.
Enable the Board to be assured of the due control over maintenance, compliance, and asset investment activities. Ensuring board reports clearly set out the potential risks and rewards of planned activities and that consideration is given to known or potential economic and legislative changes, outlining any options regarding the approach being proposed to meet them.
Provide project management of the delivery of planned or cyclical maintenance programmes, unplanned or insurance claim component replacements, adaptations and repairs.
Identify and plan alternative proposals, including divestment of stock where there are concerns surrounding present and future demand or the ability to carry out major repairs.
Maintain long term sustainability and successful occupancy of our homes by achieving value for money for our customers in the provision of planned maintenance and in accordance with HfL's Value for Money and Procurement Policies.
In line with HfL Empty Homes Policy, all properties will be inspected when they become empty and any planned maintenance items that are identified as urgent or immediately necessary will be undertaken as per the guidance contained within this policy. The stock condition database will be updated to reflect these works.
Promote linkages with other HfL policies and with external partners to promote long term stock sustainability
Ensure all cyclical compliance duties are met to ensure our tenants' homes are safe and our colleagues and contractors can work safely in maintaining our Homes

Ensure statutory and regulatory duties in respect of health & safety are complied with for Asbestos Management, Legionella Management, Gas Safety, Electrical Safety, Fire Safety, Damp and Mould.

3.2 HfL Tenant Engagement Approach to Planned Maintenance

HfL are committed to investment in the provision of safe, warm, comfortable, affordable homes and a healthy living environment, where people want to live, Homes for Life.

Every year HfL carry out a programme of planned maintenance to ensure our tenant's homes are well maintained and comfortable to live in. More information can be found in our Asset Management Strategy. This is due for review in 2025.

The planned maintenance programme considers information gathered from stock condition surveys and available funds, to create a schedule of major repair work which may include:

- Kitchen replacements
- Bathroom replacements
- Adaptations
- Space Heating Systems, Boilers and Controls
- New windows and doors
- Rewiring
- Redecoration of external paintwork
- Gutter Cleaning
- Roofing and Rendering
- Fire Safety and Security Systems
- Grounds renovations and drainage improvements

Currently defined component replacement cycles as approved by HfL board in December 2024 are:

Component	Replacement Cycle
Kitchen	25
Bathroom	25
Windows	30
Doors (front and Back)	30
Electric Heating (Storage/Panel/Unvented Cylinders)	30
Gas Heating (Boiler)	15
Air Source Heating Systems	10 – expected lifespan not board approved
Full Heating System including Radiators	30

Further to this HfL are committed to

- Ensuring that HfL properties and estates meet the needs and standards of our customers now and in future, by consulting on their priorities for investment in their homes and neighbourhoods through tenant participation activities and tenant survey processes.
- Providing our tenants with current information on investment in their home and how this will impact on them.
- Confirm at start of each financial year what properties are in planned maintenance programme for following 12 months.
- Giving our tenants at least 3 weeks' notice in advance of any proposed start date for any major works to be carried out in their home.
- Advance notice of any changes to start dates and or completion timescales
- Supporting tenants who are required to temporarily move from their home to enable a repair, improvement work or an adaptation to be carried out. This work may be part of a planned programme or the result of a disaster such as a fire or a flood. In these situations, Tenants can return to their homes after the work has been completed. This is in accordance with HfL Decant Policy and Procedures.
- Ensuring that Contractors comply with Contract Conditions and Contractors Code of Conduct.

3.3 Quality Control Approach to Planned Maintenance

HfL provide project management of the delivery of planned or cyclical maintenance programmes, unplanned or insurance claim component replacements, adaptations and repairs.

- Any defects or concerns raised by our customers during planned or major works will be responded to within our standard repairs timescales as defined in our Asset Management Policy.
- All completed upgrades as part of a planned works programme and all major repair work will be signed off by HfL Senior Maintenance Officer (SMO) or appropriate project lead or consultant who will assess the quality of works and address any areas of concern to ensure our customers are satisfied.
- We will ask customers for their feedback at the completion and sign off visit; to ensure consistency in service and satisfaction.
- HfL will use the feedback collected to report on the quality of different elements of planned works programme so all aspects of contractor performance can be monitored, and continuous improvement can be achieved.

4.0 STAFF TRAINING

All relevant staff will receive training in order for them to understand and apply our policies appropriately.

Key staff will receive support to enhance their Continued Professional Development to keep abreast of relevant Policy & Strategy changes, changes to Building Standards, Energy Efficiency and Climate Change Targets, Economic and Inflationary Impacts, Construction and Supplies impacts, Environmental Impacts.

Where skills are not skills evidenced in house; external specialist advice will be sought.

Staffing Policies which link to this are:

- Staff Training and Development Policy
- SFHA Model Code of Conduct for Staff
- Manual Handling Policy
- Working at Height Policy
- Emergency Call Out Policy
- Lone Working Policy

5.0 TENANT PARTICIPATION

HfL will work with the Tenant's Panel to review and approve amendments to this policy and to fulfil requirements under Scottish Housing Charter Outcome 3: Participation.

6.0 COMPLAINTS AND COMPLIMENTS

All complaints will be dealt with in line with HfL's Complaints Handling Policy.

HfL adopts the SPSO's Model Complaints Handling Procedures including two opportunities to resolve complaints internally:

- Stage 1: Frontline Resolution, and
- Stage 2: Investigation

Where appropriate, HfL will consider using services such as mediation or conciliation for complex complaints, or complaints where customers and other interested parties have become entrenched in their position to try to resolve the matter, and to reduce the risk of the complaint escalating further. In such instances revised timescales for resolution of the customer's complaint will be agreed.

SPSO is the final stage for complaints about public services in Scotland. This includes complaints about housing associations and co-operatives. If a customer remains dissatisfied with HfL after following its complaints handling process, the customer can ask the SPSO to consider their complaint.

HfL value and use information from complaints to help us improve our services. HfL also value and use information from compliments as it helps our staff feel valued and highlights what is important to tenants.

7.0 ROLES AND RESPONSIBILITIES

Maintenance and Asset Manager (MAM) is responsible for the implementation of this policy. Any matter which demonstrates a serious failure of internal controls should also be reported immediately to the Chief Executive Officer (CEO) who will register the risk and report all such matters to the Board.

The Board will monitor performance through the submission of quarterly reports to make sure that the aims of this policy are being achieved, this will include financial reporting against budget and customer satisfaction results.

Failure to effectively design and implement planned and cyclical programmes could result in:

- Failure to comply with relevant legislation resulting in possible legal action.
- Failure to comply with Scottish Social Housing Regulation
- Poor performance on the Annual Social Housing Charter (ARC) Return
- Costs exceeding budget levels.
- Rent loss from declining popularity of homes due to delaying replacing components.
- Injury to customers, colleagues and contractors, and the public
- Early component failure

8.0 EQUALITIES IMPACT ASSESSMENT

Please see page 12 for Equality Impact Assessment of Planned Maintenance Policy – February 2025

9.0 PROCESS REVIEW

The CEO is responsible for ensuring that this policy is reviewed every three years or where there has been new legislation, or a change in regulatory requirements or policy guidance; and that any changes required are submitted to the Board for approval.



Equality & Diversity Impact Assessment (EIA)

The aim of the EIA is to consider the equality implications of a policy, practice, or service to prevent discrimination against people who are categorised as being disadvantaged or vulnerable within society (as listed in point 4) and to consider if there are ways to proactively advance equality.

Name of the policy/practice/service to be assessed	Planned Maintenance Policy – Assets & Maintenance	Is this a new policy/practice/service or a revision to an existing?	Full Revision of Policy February 2025
1. Briefly describe the aims, objectives and purpose of the policy, practice, or service.	This policy is developed in conjunction with Asset Management Strategy and aims to complete policy guidance for HfL staff and tenants in the scope of Asset Management planned works and major repairs.		

2. Who is intended to benefit from the policy, practice, or service? <i>(e.g., applicants, tenants, staff, contractors)</i>	The guidance will support: <ul style="list-style-type: none"> • Staff in the delivery of Asset Management Services. • Contractors in the understanding of HfL regulatory requirements and organizational service commitments. • Tenants on the remit of the organization and the setting of service delivery expectations.
3. What outcomes are wanted from this policy, practice, or service? <i>(e.g., the benefits to customers)</i>	This policy works toward achieving regulatory standards and outcomes contained within the Scottish Social Housing Charter, Scottish Housing Quality and Energy Efficiency Standards, HfL Service Standards and KPI's and to ensure that HfL provide consistent and comprehensive asset management services covering the structure, exterior, major components, security and safety of our tenant's homes and the wider HF Estate.
4. Which protected characteristics could be affected by the policy, practice, or service? (✓) <i>tick all that apply</i>	Age (✓)
	Disability (✓)
	Gender reassignment (✓)
	Marriage/Civil Partnership (✓)
	Pregnancy/Maternity (✓)
	Race (✓)
	Religion or belief (✓)
	Sex (✓)
	Sexual orientation (✓)
	Consider if you want to add anymore? N/A

<p>5. If the policy, practice, or service is not relevant to any of the protected characteristics listed in part 4, state why and end the process here. See also adaptation policy and decant policy which are specifically linked to disability as a protected characteristic.</p>			
<p>6. Evidence Gathering and Engagement – This policy applies to all other protected characteristics in a consistent manner no qualitative and quantitative evidence has been gathered to inform this policy.</p>			
<p>a. What evidence has been used for this assessment? For example, national statistics.</p> <p>Scottish Housing Regulator Legal and Regulatory Frameworks</p> <p>HfL Vision, Values, Business Plan, Objectives, Strategy, Policies, Standards, Customer Promise.</p> <p>Tenant satisfaction survey results</p> <p>Tenant scrutiny panel feedback still to be completed</p>			
<p>b. Who have you engaged and consulted with as part of your assessment?</p> <p>Maintenance Officer, Housing Manager</p>			
<p>7. Describe the impact(s) the policy, practice or service could have on the groups identified in part 4. Consider both positive and negative impacts.</p> <p>This policy ensures consistency of service delivery for all customers including those with protected characteristics.</p> <p>Specific guidance is also included in Adaptation and Decant policies to support those affected by disabilities which mean standard service may not be applicable.</p>			
<p>8. What actions are required to address the impacts arising from this assessment? <i>(This might include collecting additional data, putting monitoring in place, specific actions to mitigate negative impacts).</i></p>	Issue	Action	Timescales
	Legislative updates		N/A

9. Decision Please record decision e.g., No change/amend (see above) <ul style="list-style-type: none"> • Cease • Progress with risk (monitor and add to risk register?) 	The policy does not have any adverse impact on any of the protected characteristics.
Signed	<i>SS Maxwell</i>
Job title	Maintenance and Asset Manager
Date the EIA was completed	28/01/2025
Review date	28/01/2028
Date of any quality sample check	