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Tick one of the below for review/changes made:	Reviewer / Editor: Manager, Property Services	
Full review and changes made ☐ (add changes summary to table below)	Changes Approved By: Manager, Property Services	
Full review, no changes made ☐		
Changes made but no full review ☒ (add changes summary to table below)	Reviewed and edited in-line with the Beacon? ☐ Yes ☒ No	

Planned and Cyclical Maintenance Policy

Document Change Details

Date	Summary of Changes Made
10/11/2023	All P&Ps revert to version 01 as approval process & version control moved to Sharepoint. Version number no longer shown on the document
13/08/25	Policy brought into line with Beacon language. Job titles amended to reflect job evaluation.

1.0 PURPOSE

This policy and its related procedure sets out the framework within which the Property Services team is to develop and manage its planned and cyclical maintenance programme.

Due to the levels of expenditure involved, and the financial outlay required, it is extremely important that the planned maintenance budget and programme are managed well within each financial year and that spend requirements for future years are anticipated, captured and modelled.

This policy and procedure provides a clarification of roles and responsibilities in this process and details how services and tenants are consulted and how value for money is achieved.

2.0 INTRODUCTION

A fundamental responsibility of the Property Services team is to implement programmes of action identified within our Asset Management Strategy.

These programmes broadly fall into one of four categories:

1. Work designed to ensure compliance with regulations and the law (e.g. Decent Homes, Gas Safety or the Management of Asbestos legislation).
2. Works to replace major building components that have a limited life (e.g. windows, kitchens, bathrooms).
3. Sustainability and energy efficiency improvements, usually focussed upon improving the fabric of the building or fitting lower carbon heat sources.
4. Works needed to the property at regular intervals to ensure the integrity of the fabric of the building and that it still meets residents' needs (e.g. internal or external decorations, flooring replacement etc).

Where items are placed as a responsive repair, rather than through proactive planning, evidence suggests that works are generally more expensive due to their unplanned nature and require more financial resources and time from the contractor and landlord to address.

This policy has the aim of trying to reduce the amount of responsive repairs required by maximising the number of repairs undertaken through a planned and cyclical maintenance programme and delivering improved value for money for us, our tenants and service users.

Planned maintenance is defined as being the planned replacement or renewal of major components of a property. Although some predictions can be made (e.g. that windows will need replacing every 25 years), the actual scheduling of works is dependent on continual review of condition and available budgets.

Cyclical maintenance is largely preventative or protective and consists of those works included in the planned servicing of properties to prevent gradual deterioration or compromising health and safety. It can be largely predictable and as such scheduled to take place as part of cyclical programmes e.g. annual gas servicing or six-yearly external redecoration. Cyclical programmes can be planned in and costs estimated in advance, but again grouping of works can prove beneficial if linked to other cyclical or planned works.

We have developed our own set of standard component lives for predicting and scheduling cyclical programmes of work and these are detailed in *Appendix One* of this document.

Successful management of the planned and cyclical programme means modelling and forecasting planned maintenance into the future so that we are alerted to major areas of capital commitment, either due to specific major works expenditure or the effects of timing (e.g. where a number of smaller works are due within the same time period).

As a guide, long-term plans can be developed and rough costs estimated, but these will require annual reviews to determine activities in priority order over a number of years. It can also be prudent to schedule a number of works for a single property at one time e.g. replacing windows at the same time as major work to the roof to limit scaffolding costs.

3.0 POLICY OBJECTIVES

To maintain our properties in good repair so that they continue to meet the needs of staff and tenants.

To ensure that our property management programme supports key objectives of the business, as well as property related financial and legal obligations.

To have forward visibility over the lifetime of our properties of expected costs for planned and cyclical maintenance. Keeping up-to-date records of our main property components and their lifecycles and planning for their future maintenance, replacement or renewal.

To manage works and set budgets across years in such a way so that expenditure remains broadly even each year, allowing for the effects of inflation, and allowing for some element of contingency spend.

To manage budgets within year to provide a steady profile of expenditure, monitoring cash-flow and the projected budget outcome by tracking the progress and scheduling of works, monthly expenditure against estimate, tracking contingency spend and reprioritising works and the budget where other priorities for expenditure become apparent.

To ensure data relating to property components and their renewal is systematically collated and records updated after completion of planned and cyclical works or following the scheduled five yearly stock condition surveys.

To ensure that a clear specification and agreed quality standards are developed for the planned and cyclical works. These should be continually under review and will build upon industry best practice as well as our previous experience of what will best meet the needs of its tenants and stakeholders.

To ensure that value for money is achieved in respect of all planned and cyclical maintenance work and that procurement processes comply with our Finance Regulations. To ensure that we remain compliant in respect of all legislation and best practice concerning the health and safety and other legal obligations of and to contractors and sub-contractors, staff and tenants.

In order to deliver value for money for the organisation it is essential that thought is given to how works are identified and grouped together in a way that allows us to obtain 'best value'. Works may be grouped together in order to gain efficiencies (e.g. either by procuring larger 'lots' of works together or by logically grouping the works together to save costs). It may be possible to

schedule and tender for works across several financial years together to gain improved economies of scale.

To ensure that full consultation takes place with stakeholders at all stages of the works being undertaken.

To ensure that works are undertaken in such a way as to minimise risks to health and safety for contractors, tenants, staff and members of the public. To consider all the risks presented by the works and develop strategies in order to eliminate these. To achieve this in a way that is able to evidence this consideration. Risks may be presented by:

The works to be undertaken (e.g. risk of injury through the works, tools utilised or any hazardous materials utilised etc)

The property environment itself (e.g. presence of asbestos, access arrangements or requirement to work at heights etc)

People based hazards (e.g. access by members of the public, behavioural issues presented by tenants, or specific tenants etc)

To adequately plan for these works in the context of our property stock; where possible anticipating any disruption, to the lives of tenants and stakeholders and clearly planning and communicating strategies for managing this.

To ensure that Planned and Cyclical works are carried out to agreed deadlines.

To provide sufficient flexibility within one year's programme of planned and cyclical works, that other emergency work can be accommodated within the same annual budget and within the year in question.

4.0 RESPONSIBILITIES

The Manager, Property Services holds responsibility for assembling the five year planned and cyclical programmes and for managing the agreed work programme within year.

The Manager, Property Services will oversee the activity and agree the cost estimates and the procurement strategy for the programme.

The Director of Housing and Assets holds overall responsibility for the delivery of the programme and for reporting progress to C Suite..

5.0 PROCUREMENT AND ACHIEVING VALUE FOR MONEY

The Planned Maintenance Surveyor is responsible for managing effectively the specification, estimation, tendering and procurement processes for programmes of work in order to achieve value for money for us and our tenants.

When programming work, we will seek to obtain value for money by grouping works on an individual property together (e.g. if scaffolding is required for external redecorations at the same time we will consider if any guttering or roof work is required within 5 years.)

We recognise that the cheapest option does not necessarily mean 'best value' if the cheaper option creates further financial outlay through higher and more frequent repair bills or a shorter replacement cycle.

Other related Policies and Procedures

[3-01a Property Maintenance Policy.pdf](#)

[3-01b Property Maintenance Procedure.pdf](#)

[3-02a Property Safety Management Policy.pdf](#)

[3-02b Property Safety Management Procedure.pdf](#)

[3-05 Property Asset Management and Housing Strategy.pdf](#)

[9-06 Procurement Policy.pdf](#)

Southdown's Value for Money Strategy

Appendix One: Approximate component life-cycles

Component Type	Component	Life Cycle
Bathroom	Bath & Bathroom Units	25

Bathroom	Power Shower	15
Bathroom	Shower Tray	25
Doors	External Doors Joinery	30
Doors	External Doors uPVC	50
Doors	Internal Doors Joinery	25
Electrical	Consumer Control Unit (CCU)	25
Electrical	Door Entry System	20
Electrical	Electrical Installation Wiring	25
External Decoration	External Decorations	6
External & Grounds	Boundary Fencing	20
External & Grounds	TV Aerials	15
External & Grounds	Solar panels	20
External & Grounds	External Lighting	10
External & Grounds	Boundary Wall: replacement	60
External & Grounds	Boundary Wall: repointing	6
External & Grounds	Drainage	60
External & Grounds	Stand alone garage renewal	50
External & Grounds	Outbuilding and sheds: renewal	30
External & Grounds	Outbuilding and sheds: repair & treatment	6
External & Grounds	Parking, hardstanding and drives	30
External & Grounds	Paving	30
External Walls & Structure	Fascias & Soffits	30
External Walls & Structure	Foundations	125
External Walls & Structure	Rainwater Goods	30
External Walls & Structure	Stacks & Parapets	50
Fire Alarm Systems	Emergency Lighting Fitting	10
Fire Alarm Systems	Fire Alarm Control Panel	15
Fire Alarm Systems	Fire Alarm Systems Wiring	25
Fire Alarm Systems	Heat Detector (Control Panel System)	10
Fire Alarm Systems	Heat Detector (Mains Linked)	10
Fire Alarm Systems	Smoke Detector (Control Panel System)	10
Fire Alarm Systems	Sprinkler systems	20
Fire Alarm Systems	Smoke Detector (Mains Linked)	10
Heating	Combi Boiler	15
Heating	Commercial Boiler	25
Heating	Conventional Boiler	15
Heating	Fan Heater	10
Heating	Storage Heater	25
Insulation	Thermal Insulation	20
Internal Decoration	Bedroom Decorations	7
Internal Decoration	Communal Areas Decorations	7
Kitchen	Electric Hob	10
Kitchen	Electric Oven	10
Kitchen	Gas Cooker	10
Kitchen	Gas Hob	10
Kitchen	Gas Oven	10
Kitchen	Kitchen Doors & Draw Fronts	20
Component Type (contd.)	Component	Standard Life Cycle
Kitchen	Kitchen Units	20

Kitchen	Sink	20
Kitchen	Water Heater	15
Laundry Equipment	Domestic washers and dryers	5
Laundry Equipment	Commercial Washers and Dryers	10
Laundry Equipment	Tumble Dryer (Commercial) - Gas	15
Roof	Flat Roof	20
Roof	Main Roof	60
Water Systems	Cold Water Storage Tank	30
Water Systems	Hot Water Cylinder	25
Windows	Conservatory	25
Windows	External Windows Joinery	30
Windows	External Windows uPVC	40
Windows	Roof lights	25
Windows	Internal Windows	25