

Property Maintenance  
for Managers

Property Maintenance for Managers

Facilitator Guide

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Notes to Facilitator

This guide is designed to help you manage the information for this module and to help increase consistency at all training locations nationwide.

***Duration***

This is a 6 hour module (excluding breaks and lunch).

***Materials Needed***

* PowerPoint Slides
* Creekwood Case Study
* Property Maintenance Participant Workbook (PWB)

***Equipment Needed***

* Flipchart or whiteboard with stand and markers
* Computer with connection to project PowerPoint slides
* Microphone if necessary – dependent on room size and setup
* Sound system to play videos if necessary at your location

Using Slides

You will notice that some of the slides build, and when that happens, it can be difficult for the Facilitator to know when the slide is at its end. To help with that, there is a red period that indicates the last build. On any slide where you don’t see a red period, that means that there is more, and to click again.

Knowledge Checks

There are Knowledge Checks at the end of the PWB. They are used by participants as a self-study after class and are not to be reviewed in class. A copy of the Knowledge Checks with answers is at the end of this Facilitator Guide.

Participant Workbook

Participant Workbook pages are noted throughout the facilitator guide. Use them to direct participants to summaries of classroom content. When providing page numbers, explain to participants they can follow along with classroom content, take notes, and/or use the content as a study aid after class. In some cases additional details are listed in the Participant Workbook; this is supplemental “nice-to-know” information.

Remind participants that the space provided in the workbook should be used for notes. Tested concepts and explanations will include the case study, the slides, the reference material and the facilitator’s oral explanations.

At the end of each Participant Workbook, you will see Knowledge Checks pertaining to that section. Explain to participants that they can use these for self-study after class. Answers are provided on the pages following the questions.

Module “At-A-Glance”

The timing in this guide is provided as a guideline and is estimated for an average class size of 25; modify as needed.

|  |  |  |
| --- | --- | --- |
| Topic | Activity | Duration |
| Introduction | * n/a | 5 mins |
| A X’s Role and Responsibilities | * Using maintenance issues, participants will practice asking questions needed to complete service request forms and review training and types of maintenance | 60 mins |
| Hiring Maintenance Personnel | * Participants will evaluate necessary maintenance skills and review candidate qualifications | 40 mins |
| General Maintenance Terminology | * n/a | 15 mins |
| Overseeing Service Requests | * Participants will review information on the service request summary. They will identify trends and look for causes and performance expectations. | 30 mins |
| Managing Inventory | * Participants will review emergency supplies. * Given inventory scenarios, participants will make a collective decision about what actions to take. | 45 mins |
| Hiring Contractors and Vendors | * Given maintenance and repair scenarios, participants will learn the selection process for in-house, contractor or vendor selection * Bidding and scoping of jobs will be discussed | 60 mins |
| Inspections | * Participants will learn the variety of inspections necessary for the property and look at images to identify maintenance issues to address. | 20 mins |
| Preventive Maintenance | * Participants will learn the value of and how to develop a preventive maintenance program. | 30 mins |
| Green Properties | * Participants will learn about the many ways to “green” property operations * Participants will determine the amount of water and money saved by replacing showerheads | 45 mins |
| Wrap Up | * n/a | 10 mins |
|  | Approximate time | 360 mins |

Introduction

|  |  |  |
| --- | --- | --- |
| Welcome | **Slide 1**  **Display** slide.  **Welcome** participants. |  |
|  | **Slide 2**  **Display** Materials slide.  **Provide** the following materials and explain their purposes.  **Click and Explain** the Participant Workbook:   * Used in class to follow along with information, take notes, and complete activities * Contains high-level information covered in class, worksheets, activity information, etc.   **Click and Explain** the Reference Guide:   * Used after class as an on-the-job reference * Contains detailed information about topics covered in class |  |
| Agenda | **Slide 3**  **Display** Agenda slide.  **Review** the Agenda. |  |
|  | **Slide 4**  **Display** slide.  **Introduce** video: “We asked the industry professionals in this video to give us some insight into the topic of property maintenance. Let’s see what they have to say.”  **Play** video. |  |

A X’s Role and Responsibilities

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|  | **Slide 5**  **Display** the title slide and **introduce** the topic.  **Transition** “Although many people and groups are involved in maintaining a property, the X is ultimately responsible for the property’s effective functioning, including maintenance operations.” |  |
| Maintenance Overview | **Slide 6**  **Display and Review** Maintenance Overview slide.  **Define** Maintenance   * Refers to the upkeep and repair of property and equipment.   **Click to show** each point and **Review** what is included in maintenance. **Remind** students “inspect what you expect.” |  |
|  | **Slide 7**  **Display** Property Maintenance – Purpose slide.  **Click to show** each point and **Review** the benefits and purpose of having a well-maintained property.  **Ask** “If you were looking for a new place to live what types of things would you notice when driving through the community? What kind of impression would that make?” |  |
|  | **Slide 8**  **Display** slide.  **Ask** participants how comfortable are you supervising work you may not understand.  **Introduce** video:“Our industry professionals had some things to say about the importance of learning about property maintenance.” |  |
|  | **Slide 9**  **Display** Benefits of Maintenance Knowledge slide.  **Explain** that having maintenance knowledge helps a X manage maintenance staff, communicate better, and prioritize tasks better.  **Review** examples on the slide. |  |
|  | **Slide 10**  **Display** the slide and **define** the Types of Maintenance I slide.  **Define** Exterior Maintenance, Interior Maintenance and Make Ready Maintenance  **Review** the list in the Participant Workbook. |  |
|  | **Slide 11**  **Display and Review** Types of Maintenance II slide  **List** the types of maintenance, management, and prevention discussed in this section of the module.  **Define** Capital Maintenance  **Review** information about Moisture Management Plans  **Define** Preventative Maintenance |  |

Types of Maintenance

Types of Maintenance

You will oversee the Maintenance Supervisor or Service Manager, but the Maintenance Supervisor or Service Manager is responsible for the “market-ready” condition of a property.

| **Type of Maintenance** | **Description** | **What is Included** | |
| --- | --- | --- | --- |
| **Exterior** | Repairing or replacing items to keep building *exteriors* in excellent condition | * Landscape irrigation * Exterior lighting * Siding and roofs * Fences and retaining walls * Drives and parking lots * Sidewalks and other concrete surfaces * Trash enclosures * Doors and windows | |
| **Interior** | Repairing or replacing items to keep building *interiors* in excellent condition | * Walls, ceilings, windows, floors * Safety components   + Smoke/CO detectors   + Fire extinguishers * Doors, cabinets, counter tops * Electrical and mechanical * Appliances, plumbing, HVAC | |
| **Make Ready** | Repairing or replacing items to make a unit “market ready” and meet the expectations of prospective residents | 1. Pre-inspection 2. Trash removal 3. Pest control 4. Mechanical systems – electrical, plumbing, appliances, HVAC 5. Retrofits & rehab items 6. Drywall, doors, windows, screens, locks, cabinets, counters, vanities | 1. Shelving, towel racks, ceiling fans 2. Storage rooms, pantries 3. Painting, caulking 4. Flooring 5. Drains, sinks, tubs, showers 6. Post-inspection 7. Final cleaning and welcome gift |

| **Type of Maintenance** | **Description** | **What is Included** |
| --- | --- | --- |
| **Capital Expenditure Projects** | Large, non-recurring property expenditures that add to the “useful life” of a property  Note: Depreciated over an expected life rather than a single year and are not used to calculate NOI | Non-recurring expenses, such as:   * Replacing a roof * Painting buildings * Repaving a parking lot * Adding a swimming pool |
| **Preventative** | A proactive approach to protect and maintain the value of property.  It maintains the property so deferred projects do not overwhelm staff and helps meet requirements for inspection set by authorities. | All aspects of interior and exterior areas of a property. |
| **Moisture Management Plan** | A plan outlining how to deal with maintenance issues related to water damage, moisture infiltration, visible mold, or musty/moldy odors   * Many lenders and insurance carriers require properties to have a plan * Treat issues of this type as emergencies and follow a specific protocol * Know what actions to take for water damaged materials | * Carpet, backing and pad * Ceiling tiles * Cellulose insulation * Fiberglass insulation * Concrete or cinderblock surfaces * Hard surface, porous flooring (linoleum, ceramic tile, vinyl) * Non-porous hard surfaces (plastics and metals) * Upholstered furniture * Wallboard (drywall and gypsum board) * Window drapes * Wood surface |

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|  | **Slide 12**  **Display** Reference: Types of Maintenance slide.  **Refer** participants to the Participant Workbook for more information about each of the **Types of Maintenance**.  **Review** content from Participant Workbook. |  |
|  | **Slide 13 12**  **Transition** “We now know a little more about what maintenance is and why we do it. It’s clear that it takes a team to accomplish all of the tasks. And that team needs to be focused in one direction. So let’s talk about how we get it done.”  **Play** Copa Airlines video.  **Slide 14 12**  After watching the video, **guide** participants to answer the three concept questions as a class. **Solicit** personal takes on the lesson points.  **Reinforce** the concept that a team plays a critical role in strengthening performance for a property.  **Ask** volunteers to share ways they have or would encourage using this approach with maintenance on their property. |  |
| Standards | **Slide 15 13**  **Display** Setting Standards slide.  **Explain** that a key component of property maintenance is setting high quality standards to ensure that the property is well-maintained and improved.  **Explain** that setting high quality standards is another action Xs can take to achieve their ultimate goal: to add value to the property. |  |
|  | **Slide 164**  **Display** Quality Standards slide.  **Explain** that quality standards include the way you treat others. A X sets the tone for the team and should act in the way they want staff to act. This includes:   * Set an example to follow * Be respectful, ethical, and honest   **Click to show** each point and **Review** the remaining key points in the slide.  **Explain** that quality workmanship extends the useful life of everything on the property such as:   * Buildings * Equipment * Mechanical systems * Major appliances * Landscaping   **Click and Emphasize** the final key point on the slide. |  |
|  | **Slide 17**  **Display** Communicating Standards slide.  **Ask** “What happens if a standard or expectation isn’t communicated properly?”  **Accept** responses. Responses will vary.  **Explain** that to avoid the adverse effects participants listed, a X must communicate expectations well.  **Click and Review** the communication tips listed.  **Note** that staff should know their manager will check that they completed the requested work.  **Ask** “What are some ways to clearly communicate expectations?” |  |
| Maintenance Personnel | **Slide 186**  **Display** slide.  **Emphasize** the value of maintenance personnel to a property. **Ask** how many of you are looking for staff right now. |  |
|  | **Slide 197**  **Display** slide.  **Emphasize** the impact maintenance personnel have on the resident experience. Quality maintenance leads directly to strong resident retention. |  |
|  | **Slide 208**  **Display** Maintenance Personnel slide.  **Click to show** each point and **Read** the ways Maintenance can make major contributions to a property’s financial condition. |  |
|  | **Slide 219**  **Display** X Responsibilities slide.  **Click to show** each point and **Review** key tasks listed on slide.  **Provide** examples where applicable.  **Use** the last bullet as a transition into the next four slides.  **Ask** “Which of these responsibilities is most important to you on your property right now?” |  |
|  | **Slide 22 20**  **Display** Reference: X Responsibilities slide.  **Refer** participants to the Participant Workbook for a summary of **X Responsibilities.**  **Review** content from Participant Workbook. |  |
|  | X Responsibilities   * Keep current with new laws and regulations that impact the property, particularly those relating to safety for residents and staff. * Maintain records and required certificates (occupancy, elevators, swimming pools, etc.) for the property. This includes the Environmental Protection Agency (EPA) certification for working with refrigerants and Certified Pool Operator (CPO) where required. * Understand the maintenance repairs necessary to ensure that all OSHA, local and state safe workplace requirements are met. * Conduct inspections. * Oversee safety issues and emergencies. * Hire qualified maintenance technicians and evaluate their performance. * Know when to use a contractor, and how to write a job specification and conduct a bidding process. * Understand basic contracts. * Prepare and monitor budgets. * Plan for capital expenses. * Set maintenance up for success. |  |

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| Set Maintenance Up for Success | **Slide 23 21**  **Display and Review** Set Maintenance Up for Success: Manage Tasks & Personnel slide.  **Transition** “Let’s see some of the ways you can set your maintenance personnel up for success.”  **Read** the ways a X can set maintenance up for success.  **Click and Review** the key points on the slide. |  |
|  | **Slide 24 22**  **Display and Review** Set Maintenance Up for Success: Have a Plan slide.  **Review** the key points on the slide. |  |
|  | **Slide 25 23**  **Display and Review** Set Maintenance Up for Success: Work with Staff slide.  **Review** the key points on the slide.  **Say** “Have your sneakers ready. Walk the property.” |  |
|  | **Slide 26 24**  **Display and Review** Set Maintenance Up for Success: Work with Others slide.  **Review** the key points on the slide.  **Ask** “Do you have a list of contractors ready if needed?” |  |
|  | **Slide 275**  **Participant Workbook**  **Refer** participants to the Participant Workbook for an unabbreviated list of ways to **Set Maintenance Up For Success**.  **Review** content from Participant Workbook. |  |

Set Maintenance Up for Success

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| **Manage Tasks & Personnel** | * Know what maintenance work must be done * Know what is scheduled for the day * Work with the maintenance supervisor to assign responsibilities; delegate tasks and prioritize tasks * Work closely with and utilize skills of the maintenance supervisor or service manager * Understand the duties/responsibilities of maintenance personnel * Speak with the maintenance supervisor or staff daily * Respect workloads and schedules * Schedule 20% of day for supervisor * Set attainable goals |
| **Have a Plan** | * Create a plan (daily, weekly and long term) * Work with your maintenance supervisor to set schedules for daily, weekly, monthly and overtime maintenance work * Develop a budget * Work with your supervising office to plan and implement preventative maintenance programs * Execute, adjust, and anticipate needs * Take a proactive approach to anticipate maintenance issues; “Fix it before it breaks” * Make decisions * Establish a standard for high quality work; “Inspect what you expect” |
| **Work with Staff** | * Inform the staff that maintenance and curb appeal is everyone’s responsibility, not just maintenance personnel * Everyone is responsible for the appearance and upkeep of the property * Listen, discuss and/or explain specific problems * Share information and decision making * Seek input for possible decisions and timeframes * Discuss maintenance in every staff meeting – even if it is only a brief update or praise for everyone’s effort * Include service technicians in off-site activities such as community service and job fairs |
| **Work with Others** | * Work with contractors * Develop a network for finding help: schools, temp employees, contractors, vendors * Engage residents in conversations on grounds and in their homes * Encourage residents to report maintenance needs promptly before they become more costly repairs or emergencies – not just when rent is due * Follow up to make sure repairs were completed and the resident is satisfied |

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| Maintenance Training | **Slide 286**  **Display** Maintenance Training slide.  **Transition** “Training is an excellent way to set your employees up for success.”  **Review** the key points on the slide. |  |
|  | **Slide 297**  **Display** Reference: Training Types slide.  **Refer** participants to the Participant Workbook for a summary of **Training Types.**  **Review** content from Participant Workbook.  **Ask** the participants how important the office staff is in taking service requests. |  |

Training Types

|  |  |
| --- | --- |
| **General Training** | **Office Staff** |
| * Provide training opportunities & professional development * Cross train regularly | * Staff must take accurate, detailed service requests * Getting work done right the first time:   + Saves time & money * Increases resident satisfaction |
| **Technician Training** | **XT** |
| * Increases:   + Maintenance personnel’s skills   + Productivity   + Employee job satisfaction   + Resident satisfaction   + Work finished correctly the first time * Reduces:   + Maintenance expenses   + Wasted time   + Employee & resident turnover   + Service call backs * Include technicians in reward, incentive and recognition programs * Encourage relationships with technicians at other properties * Include technicians in mystery shopping assignments | XT training:   * Consists of seven courses. * Is an introduction for new maintenance professionals or a refresher for more experienced maintenance technicians. * Gives professionals the knowledge and tools necessary to run an effective maintenance operation. * Is accredited by the American National Standards Institute (ANSI), a private non-profit organization that administers and coordinates the U.S. voluntary standardization and conformity assessment system.   Prerequisites for the Certification:   * One year of apartment or rental housing maintenance experience * Successful completion of the seven courses and online content * Meeting all examination requirements within 24 months of declaring candidacy for XT   XT provides the knowledge and tools necessary to run an effective maintenance operation.  For more information: [http://www.Xhq.org/learn/education/designation-programs](http://www.naahq.org/learn/education/designation-programs) |

***Maintenance Technicians who increase their skill levels and accept greater responsibility create a stronger team and potentially add greater value to the property.***

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|  | | **Slide 30 8**  **Display** Maintenance Training for Office Staff slide.  **Review** the key points on the slide.  **Click and Emphasize** the key points on the slide. |  | |
|  | | **Slide 319**  **Display** Activity: Take Service Request Order slide.  **Duration: 20 minutes**  **Instructions:**   * In groups, put together a list of questions Xs should be asking when someone calls with a service request to be sure that the request is as specific as possible.   + Scenario One: My disposal doesn’t work.   + Scenario Two: I have no hot water.   + Scenario Three: I have no power.   **Debrief:**   * **Ask** “What questions did you ask for scenario one (disposal doesn’t work)?”   ***Sample answers:***   * + When was the last time you put something in the disposal? What was it?   + Is it making any noises when you turn it on?   + Will there be children alone in the apartment (maintenance can’t enter if there are children alone in the apartment)? Pets? * **Ask** “What questions did you ask for scenario two (no hot water)?”   ***Sample answers:***   * + When did it start?   + Did you check the fuse box?   + Did you pay the water bill?   + Is this a localized problem or is it all over the unit?   + Will there be children alone in the apartment? Pets? * **Ask** “What questions did you ask for scenario three (no power)?”   ***Sample answers:***   * + Did you check the breaker?   + Is the pilot light on?   + Is there water leaking? Is the water penetrating to other parts of the apartment?   + Will there be children alone in the apartment? Pets? * **Discuss** how the information collected impacts service requests and resident interaction. * **Explain** that a missed piece of information results in an additional call to the resident , using more time, not providing a technician with the information they need, service request form, etc. | 04_PropertyMaint_slide 25.jpg | |
|  | | |