



# **Maintenance Strategy and Planning**

# GUIDE to THE POLICY; STRATEGY and MAINTENANCE of PHYSICAL PROPERTY ASSETS

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# **Contents:**

# Introduction

Strategic Approach

Context Maintenance Maintenance Policy Maintenance Strategy Standards and Legislation Health and Safety Structure and Responsibilities Communication; Reporting and Emergency Actions

# **Maintenance (Strategic Planning) Process**

**Documented Plans.** [Strategic and Action]

Strategic Plans Secondary Plans

Work Not Regarded as Maintenance

Maintenance System [Plan] Hierarchy

# Maintenance: Strategic Approach

**Risk Management** 

Immediate Maintenance Programme

# **Property Classification Models**

- Property Rating
- Condition Rating
- Priority Rating
- Reason Rating

Maintenance Methods

### Introduction

This document references West Lindsey District Council's formal and agreed approach to the development and management of maintenance activity across its administrative area, its approved 'Maintenance Policy' and strategic approach.

The guide contains the principal elements of our maintenance strategy i.e. structure and methods of assessment allied to performance objectives and scope of maintenance.

The guide should be regarded as a point of reference, to be read by those who seek further clarification in respect of the Authority's formal, corporate, approach to maintenance i.e. the 'Maintenance Policy', and by officers and staff of the Authority who are involved, directly or indirectly, in the provision of maintenance services or who seek clarification in respect of the maintenance system; principal processes and strategic approach adopted by the Authority.

The guide is not intended to cover aspects of day to day maintenance e.g. individual processes; protocols, nor day to day maintenance activity, but it will indicate the core principles applied and the objectives and approach to property maintenance along with the identification of responsible persons and individual responsibilities.

The guide will note appropriate reference material e.g. standards; codes of practice and best practice which are current at the time of writing.

The guide, particularly reference material, should be reviewed annually in order to ensure that the reader is aware of current information; statutory requirements; and best practice.

# Strategic Approach.

#### Context

The Authority's approach to property maintenance will follow the agreed and approved structured approach [and methodology] as applied to 'Asset Management' whereby strategy, planning and lower order actions will cascade down from a principal policy statement.

The overall strategic approach will be identified in this "Guidance" document along with the approach to strategic level action planning leading to individual action plans and maintenance programmes.

#### Maintenance

#### Definition

Defined within British Standard BS 3811-1993 (now formally withdrawn as a single standard), maintenance is: -

". the combination of all technical and administrative actions, including supervision, intended to retain an item or restore it, to a state in which it can perform a required function".

#### **Maintenance Policy**

Identifies the overriding principles applied to maintenance in order to achieve the Authority's objectives for quality property assets and a sustainable and safe portfolio.

### **Policy Statement**

West Lindsey District Council is committed to providing buildings; premises and facilities which, (for employees; visitors; contractors and all user groups) are safe; well maintained; clean; accessible and which will provide a comfortable and secure environment.

Our buildings and facilities will be reliable; fit for purpose; compliant with current legislation and will fully support the delivery of the council's service obligations and corporate goals. We will maintain our buildings and facilities in a manner which protects and/or enhances their monetary, or strategic, value for the duration of our ownership.

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#### **Maintenance Strategy**

Identifies the approach to delivering the 'Policy' objectives through controls; quality standards; plans; processes and responsibility.

#### Maintenance Strategy

Principles

West Lindsey District Council has adopted a strategy of full compliance and total maintenance in respect of its property portfolio. The strategy will apply to all property assets for the duration of the Authority's ownership. Property will be held by the Authority either as an operational, community, residential or investment asset and maintained to the agreed standard.

Property assets which do not or cannot add value to the Authority and support its corporate objectives will be maintained to a 'safe' level and scheduled as either miscellaneous or surplus for disposal; refurbishment or demolition thus minimising capital/revenue costs and risk.

The Authority will execute a programme of audits to establish the current [and on-going] condition of assets [physical and service infrastructure] along with levels of compliance. Repair and maintenance planning will focus initially on the requirements of business-critical assets and on those assets where compliance failure is reported, or urgent repair is prudent to good management.

The overall approach will centre on knowledge-based decisions; planning; pre-planning; quality and identifiable & robust control mechanisms.

# **Standards and Legislation**

The principal standard applied by the Authority in its approach to the development (and delivery) of an effective and robust system of maintenance is: -

#### 'BS 8210 – 2012 Guide to Facilities Maintenance Management'

This standard is supported by relevant elements of **BS 3811 – 1993** (see above) in conjunction with applicable British Standards and Codes of Practice relevant to specific practice and requirements. At all times and in respect of all elements of maintenance activity [planning & delivery], the appropriate standards and codes of practice should be referenced and adhered to.

A summary of the most relevant standards and codes is appended to this guide.

In developing and maintaining a system of maintenance management and maintenance activity, the Authority emphasises the need to continually cross reference existing policy requirements [within the Authority], and the Authority's published 'Corporate Plan'.

All executive officers; officers and operational staff should reference the requirements and guidance within BS 8210-2012 [as a minimum] when carrying out any maintenance planning; activity or function along with specific statutory requirements.

# **Health and Safety**

Throughout the development of the overall approach to maintenance and maintenance planning, the Authority should/will, continually reference the applicable requirements of H&S legislation and HSE codes of practice as they apply to any identified works. This applies to the contractor(s) and their levels of compliance and approach to H&S (for employees and all third parties) as well as a recognition of the Authority's own responsibility as direct and indirect employers and agents. As an element of the maintenance planning process, the Authority must consider and develop a schedule of core procedures to ensure contractor compliance with national standards and with the council's own standards. A process of jointly agreed (Authority & Contractor) procedures is advocated.

The Authority is recommended to consider, in particular, the use of 'Permits to Work'. **HSE – HSG: 250** provides guidance on 'Permit to Work' systems.

The permit to work is a system which should state, in precise terms, the work to be done, when and which parts (of the work) are safe. The permit should not be regarded as a permission to carry out a potentially dangerous job, nor does it make a job safe. The permit should be framed within the 'Risk Assessment' procedure and regarded as a formal recording process identifying potential hazards and controlling work which is potentially hazardous. It is 'risk mitigation'.

Permits to work are not mandatory and should be considered only where potential hazards or risks to work are identified e.g. through the 'Risk' assessment process.

# Structure and Responsibilities. -



# Maintenance Objectives, Methodology and the Maintenance Planning Process. -

In order to meet the principle strategic objectives of the Councils approach officers involved in the maintenance planning process at all levels, will take into account and employ the 11 stage process model contained in BS 8210:2012 - maintenance planning process which is discussed later in this guidance and the model is shown as Appendix 1.

The Executive Director of Economic and Commercial Growth will sponsor, approve and provide support to the whole process. They will provide corporate direction and work with the Property & Assets Team Manager to develop maintenance objectives and identify resource requirements.

The Property & Assets Team Manager, Senior Property Strategy and Projects Officer and Senior Facilities Officer will be responsible for establishing asset definition, performance requirements, maintenance identification and prioritisation, the development of delivery maintenance audits, assessment of resource requirements and preparation of plans (stages 1 to 9).

The Building Maintenance Technician will be responsible for the implementation of maintenance plans, procurement of works, programme monitoring (time, cost & quality) review, and control and reporting of performance.

The whole process will be supported by the Property & Assets Support Officer who will ensure that the Authorities CAAM system is maintained, updated and remains fit for purpose.

# Communication; Reporting & Emergency Actions -

As part of the planning process the service will develop a communication plan that will consider the giving and receiving of asset planned and unplanned maintenance information. The plan will clearly explain why the plan exists, detail what the service aims to achieve, identify who will need to know (identify the stakeholders), when we shall communicate, what messages we shall seek to get cross and identify the tools, means and methods of distribution.

As part of the process consideration will be given to the differing scenarios ie planned maintenance, unplanned maintenance, maintenance reporting and emergency reporting processes and protocols.

The plan will contain a communication plan template for which a typical example is shown below. Adopting this approach will provide consistency and clarity to both the user and recipients.

Communication Plan : Emergency Works				
What	Target Audience	When?	Method of	Provider
Information			Communication	
Guildhall 2 <sup>nd</sup>	WLDC staff based at the	Immediate	e-mail	Property Services
floor disabled	Guildhall			
wc not	Tenants located in the Guildhall			
working				

# Maintenance (Strategic Planning) Process

BS 8210:2012 advises that maintenance planning should adhere to the following (structured) approach. This will be adopted by the Authority.

The facility [property & infrastructure] assets required to support the business and the delivery
of services should be identified and defined. (Scheduled in the Authorities CAAM system)
[All other physical property assets should be recorded [and similarly defined] pending any
decision relating to their future].

#### Note.

For the Authority, this includes both operational, community, residential and investment assets [property]. For investment property, the extent of the Authority's obligations should be identified. Where no direct responsibility exists e.g. where tenants are in occupation, the tenant's performance obligations under the terms of the lease must be monitored on a regular and pre-determined basis. Infrastructure refers to building services i.e. electrical and mechanical & engineering. All property assets will be recorded on the Authorities CAAM system.

2. The required level of facility asset performance, including any performance indicators, should be agreed and recorded.

#### Note.

The level of performance should reflect the facilities required availability followed by the occupational requirements; cost in use; sustainability and agreed secondary factors.

3. The condition and sufficiency of facility assets for their intended purpose should be audited.

#### Note.

The requirement will be met through a process of scheduled inspections for physical condition; mechanical; electrical and engineering services and compliance.

Facilities inspections [e.g. space; location and infrastructure performance] should be programmed.

4. The scope of the maintenance required should be identified through GAP analysis.

#### Note.

This requirement will be met having regard to the results of the surveys listed in 3 above. Surveys will identify current urgent, backlog and future maintenance requirements. Legal and corporate requirements can be assessed against actual recorded condition and performance.

5. An appropriate maintenance method from those available should be selected.

#### Note.

Resulting from the surveys, immediate / critical maintenance should be identified, and the appropriate action taken, this will include emergency and failure maintenance / repair. The extent of any backlog maintenance can be quantified.

On completion of a full analysis of the survey results a strategic approach may be determined comprising the approach to 'Reactive Maintenance' and its sub categories [e.g. unintended failure] and pre-determined 'Planned Maintenance' comprising for example, 'run to failure'; 'time based'; 'age based'; 'condition based'.

- 6. The resources required for the chosen maintenance method(s) should be assessed.
- 7. Short; medium & long-term plans & budget estimates should be prepared.
- 8. Tactical and individual facility plans should be prepared.

#### Note.

This should include individual plans for backlog maintenance (deferred planned and unplanned repairs) and agreed (where this approach should not materially and substantially have a negative impact on operational and capital value).

Tactical plans should have reference to ongoing and planned maintenance of critical assets with planning cascading down through to less critical facilities.

- 9. Resources required and identified in (6) above should be confirmed.
- 10. Begin plan implementation and programming.
- 11. Performance monitoring; plan and deliver review.

The standard suggests that the information secured as a result of the process should be used to reinform the Authority of the value, need for and use of individual assets i.e. a possible re-evaluation of facilities comprising the asset base and their ability to satisfy corporate needs; objectives and requirements.

This approach should be applied across the operational portfolio as a minimum.

#### **Documented Plans.** [Strategic & Action]

#### Strategic

At the highest level, the maintenance system and strategic approach should align with the principles of asset management identified in the Authority's 'Asset Management Policy' and 'Strategic Asset Management Plan' and specifically those strategic initiatives which align with, support and inform the overall maintenance of the property portfolio and the retention of a safe; compliant and value driven estate.

Specific strategic initiatives (within the Strategic Asset Management Plan) which support, and direct maintenance activity are: -

- 1. Building condition audit; Physical condition [structure]
- 2. Physical condition [M&E] audit
- 3. Compliance audit; buildings and facilities
- 4. Sustainability audit.
- 5. Facilities capability audit

The results of the initiatives (audits) will form the basis of an overriding maintenance (action) Plan leading to subsidiary (Individual Action) plans.

Asset Management Action (subsidiary) Plans are defined (ISO 55000) as "Documented information that specifies the activities; resources and timescales required for an individual asset or group of assets to achieve the organisations [asset management] objectives".

Maintenance (action) plans should develop from the 'ordered approach' below: -



The activities in the (action) plan(s) fulfil the primary objectives of maintaining the asset.

#### Secondary [action] Plans; Maintenance

Secondary level action plans [defined above] contain the detailed objectives [work required] applicable to specific assets e.g. individual buildings or groups of assets or specific elemental works (e.g. roof repairs; H&V etc applied across the whole or part of the portfolio). For each plan, the resources required should be assessed against the resources available and a balanced approach agreed.

An iterative approach to the resource assessment (requirement and availability) is recommended as this will help in the balancing requirements i.e. 'Optimisation'.

As with Strategic Initiatives, the plans should contain schedules of resource requirements, reasons for action, timeframes and agreed performance outcomes. Where possible, the value added, as a result of maintenance interjection, should be identified and reported.

The principal objective of the action plan(s) should be to document and define the requirements and communicate these to: -

- Internal staff who need to complete the actions
- External / contracted staff involved in delivering the maintenance activity
- Management, who need to agree the resource's e.g. finance; staff etc.
- Identified stakeholders e.g. members and other stakeholders.

As prescribed in other (West Lindsey) approved documents, individual plans must, in order to succeed as communication tools, be as clear in content as practicable, be easy to read and be as short and concise as practicable.

Base detail and data (applicable to any specific plan) should be referenced and not repeated in every plan. This approach will reduce the size and complexity of the plan document itself and reduce the risk of incorrect; inappropriate or out-of-date data being applied.

Sources of good / best practice and interpretation of ISO 55000 indicates that the following format for action plans could be utilised.

• Asset & Plan Information. A description of the scope of the subject plan; the criticality [level of importance] and value of the assets covered and any interdependencies with other assets (either to maintain the subject value or maintain the value of other assets)

- **Owners and Stakeholders.** A schedule of roles; responsibilities and stakeholders relevant to the asset(s) covered by the plan should be identified.
- Current and Desired Levels of Performance. Relates to the asset management (maintenance) objectives specific to the plan. This requires a 'level of Service' statement [target] which is then assessed against historic [audit] data. The 'GAP' identifies the work to be done and the rationale supporting the work.
- Life Limiting Factors. A description of the factors which could or are expected to impact on the assets ability to function according to plan or requirements. Factors could include cost; obsolescence; wear & tear, accelerated deterioration or demand changes. This information could more clearly justify the level of 'spend' on maintenance or, indicate action beyond maintenance e.g. major refurbishment or disposal.
- **Life Cycle Factors.** Identify the current approach to maintenance and the existing maintenance programme. Identify any requirement to change the programme and the reasons for change.
- **Health; Safety and Environment**. Outline which, if any, of the issues have any impact on the asset and the planned activity.
- **Budget.** A summary of any detailed budget showing the required and allocated resources for the delivery of the plan. The summary should be segmented into elemental spend.
- **Risks.** A summary of the key risks applicable to the Asset as well as the proposed works. The full 'Risk Register' is not required but it should be referenced. Note the comments in respect of 'Permit to Work' above.
- Actions. List the prioritised and resourced actions [maintenance] activity
  - For individual assets [buildings] this should be restricted to direct and planned maintenance activity. It may [as part of medium-term planning (advised)] identify revised maintenance schedules or replacement of elements due to obsolescence (time based or technical).
  - For asset groups, the above may apply.
  - For elemental maintenance across the portfolio (or part of the portfolio) e.g. services; roof; windows etc, revised service schedules should be identified.
- Beyond Maintenance Activity. For individual assets (buildings / facilities), actions and proposals, where known, *could* be appended to the plan. Such actions may fall beyond the agreed scope [action & budget] of maintenance (see note below), but their inclusion may be advantageous and support/inform future activity. 'Beyond maintenance activity' actions should be noted [not necessarily detailed] in the principal maintenance plan but should also be referenced [again when known] in the facilities 'Building Manual'.

#### Note.

The above format represents a robust approach to any action plan relative to an identified [single] asset or wider group asset maintenance plan or any asset class. It can be tailored to meet the specific requirements of the Authority and its particular objectives.

The elements identified highlight core elements and their inclusion will serve to offer the highest level of communication; information and plan requirements.

#### Work Not Regarded as Maintenance

In order to effectively 'ring fence' maintenance activity and balance and control dedicated budgets, work beyond a certain level and scope should be specifically excluded from maintenance operations (and their associated budgets). The scope of such works should be clearly identified within the Authority [Strategic Asset Management Plan] and may include: -

- 1. Improvements and upgrading to meet new service capacity or functions
- 2. Major works of refurbishment
- 3. Capital replacement of major components to extend the capacity or useful life of the asset e.g. works that can be capitalised in accordance with WLDC & Government accounting policy
- 4. Upgrading to meet new statutory requirements
- 5. Day to day operational tasks to enable occupancy and use e.g. cleaning; security and waste services
- 6. Supply of utilities
- 7. Construction (re-construction) of assets and / or major restoration required as a result of out of course events (total or partial loss)

#### Note.

The above list is not exhaustive, a more complete schedule should be agreed and compiled in order to avoid uncertainty and inappropriate budget claims.

# Maintenance System [Plan] Hierarchy.



# Maintenance: Strategic Approach [Strategy]

The core principles of the Authority's strategic approach to maintenance is noted in the statement at beginning of this document **'Maintenance Strategy; Principles'** and clearly states the overriding objectives to be met. Similarly, the **'Structure; Responsibilities'** and **'Decision Process'** is noted above as is the **'Primary Reporting Methodology'**. These elements are central to the Authority's strategy.

To complete the strategic approach, the following is required: -

- Risk approach,
- Immediate maintenance issues
- Property classification models
- Maintenance methods available for medium and long-term management

Addressing the following elements will further support the requirements of the strategic approach.

# **Risk Management**

Risks associated with maintenance will be managed in the following order of priority;

- 1. Assets requiring immediate maintenance to prevent injury and/or financial loss.
- 2. Maintenance in respect of H&S issues.
- 3. Statutory maintenance requirements; security, fire, gas, electrical and water.
- 4. Structural maintenance and structural integrity including building fabric.
- 5. Elements within the curtilage of any facility for which the Authority has responsibility.
- 6. Maintenance of unoccupied assets identified for disposal; demolition or other purpose.

#### Immediate Maintenance Programme

Following the structural; compliance; H&S and M&E surveys, any defects or maintenance issues identified as urgent or critical (see priority rating below) will be rectified through a planned programme of urgent work. The urgent work programme / plan should be regarded as a priority initiative within the principal maintenance plan.

#### **Property Classification Models**

In order to ensure a balanced programme of immediate and planned maintenance and optimise the available resources, the Authority will classify physical property assets according to the following models. These models will set the direction & timeframe for maintenance activity.

#### **Property Rating**

Classifies properties by order of their functional corporate importance. Decisions in respect of importance & service delivery will be made and approved by the Authority's 'Property Group'.

S1	Critical to core service or high-profile asset to be in the best possible condition, maximum availability
	required.
S2	Important to core service, asset to be in good condition operationally and aesthetically, minimum
	downtime.
S3	Core service, asset to be in compliant and in reasonable condition, able to meet operational and
	statutory requirements.
S4	Non-core service operational facility. Meets minimum acceptable statutory and operational
	requirements.
S5	Non-core service, non-operational property maintained to meet minimum statutory requirements
	only. Unoccupied and considered to be ancillary to requirements subject to asset review.

#### **Condition Rating**

The table categorises the condition of an identified building or facility by applying a Government approved rating system. Condition assessment will be based on the real time data collected [initially] from the programmed condition surveys.

А	Good. Facility performing as intended and operating efficiently
В	Satisfactory. Facility performing as intended but showing signs of minor deterioration.
С	Poor. Facility not operating as intended and showing signs of major deterioration or defects.
D	Bad. Facility demonstrates serious risk of imminent failure. Requires critical and urgent review.

# **Priority Rating**

Government approved rating system.

Identifies the degree of urgency [and level of importance] attached to identified defects.

1	Urgent. Work required to prevent immediate closure. Addresses a [potentially] serious failure of structure; breach of legislation and/or poses a general risk to health & safety.
2	Essential work required [within 2 years] to prevent serious deterioration of fabric or building services or remedy minor breach of legislation or H&S and which can be managed until full maintenance effected.
3	Desirable work required within 3 to 5 years which will prevent the deterioration of fabric or service and/or address low risk minor breaches (legislation and/or H&S).
4	Long term work required beyond a five year window.

# **Reason Rating**

Identifies the nature of the defect reported. Where any defect covers more than one of the identified definitions, the most serious definition will determine the priority level. Where there are competing facilities, with the same priority ratings, additional reason ratings should be considered.

Reason ratings should always be recorded as they can provide a history of individual or group asset failures and an indication of (any) emerging patterns of failure. Any identified patterns may serve to inform and subsequently re-direct planned maintenance activity.

R1	Statutory or Health & Safety breach
R2	Total or partial loss of service
R3	Deterioration of fabric; structure or services
R4	Security implications
R5	Disabled access implications

# **Maintenance Methods**

The approach to maintenance should be considered under two principal headings; Reactive and Planned (programmed). For each heading a number of operational approached can be applied with consideration being given to the possibility of a mixed approach for individual or group assets.

# **Reactive Maintenance**

# "The required repair, replacement or restorative action performed on an asset, after the occurrence of a failure, in order to bring the asset to at least its minimum acceptable condition".

Can form the basis of a strategic approach across the asset portfolio, where it is described as 'Run to Failure' but, for all but the most specific circumstances, its application as a formal cross (all) asset, core approach, it is not advocated.

It may be applied to certain asset elements, but the 'Reactive' element should (generally) be restricted to the circumstances as noted in the table below.

Reactive Maintenance	Emergency or Incident Maintenance	Unplanned maintenance action carried out as quickly as possible, in order to restore an asset to a safe and operationally efficient condition. May be a result of fire; storm; collision; civil commotion; accident or other negative third-party activity.
	Breakdown Maintenance	Unplanned and reactive maintenance performed to restore an asset to a safe and operationally safe condition following an unforeseen structural or mechanical failure

Disadvantages	Advantages [Useful Where]
Expensive in both direct & indirect costs.	Failure is unpredictable but anticipated
Element failure may cause failure in other assets or Associated components.	Cost of performing RTF is lower than other types of maintenance
Difficult to schedule.	The failure is too low in priority to include it within a planned regime.

#### Planned (Preventative) Maintenance

### "Maintenance carried out at pre-determined intervals or according to prescribed criteria and intended to reduce the probability of failure or the degradation of the functioning, and the effects, limited". BS 3811:1993

Preventative maintenance thus comprises pre-planned actions performed on assets before the occurrence of a failure in order to protect them and to prevent; eliminate or minimise degradation and downtime.

The overriding advantage of planned (preventative) maintenance, for both buildings and their supporting M&E installations, is that it's adoption will satisfy most maintenance objectives.

Applicable to facilities and/or	It maintains facilities and assets in	Activities include replacement;
assets whose failure or	such a condition that breakdowns	adjustments; major overhauls and
interruption could have serious	and emergency repairs are	inspections
implications.	minimised.	

The most relevant Planned (Preventative) maintenance methods applicable to the Authority include: -

- Preventative Maintenance
  - Programmes of work developed from planned; periodic inspections. Designed to address major maintenance issues where significant failure or deterioration has been identified and maintenance input is required to restore the asset to its intended level of condition and performance.
  - Routine Maintenance. Activity, which is planned, repetitive and periodic such as minor adjustments, painting, cleaning, lubrication, service interval maintenance.
  - Running maintenance. Minor routine maintenance carried out prior to planned maintenance and not impacting on the occupation or use of the facility.
  - Opportunity (preventative) Maintenance. Performed in a window of opportunity and having positive cost implications.
- Term Maintenance (Preventative, Cyclical, Servicing or Time Based). Used to comply with statutory or manufacturer's requirements and for building services. Undertaken at predetermined time intervals as required by statutory, technical or operational reliability considerations. This may be applied to building structures, fabric, services and site improvements but is used predominantly for the maintenance of mechanical and electrical services.
- Deferred [Backlog] Maintenance. Comprises corrective maintenance activity not immediately initiated following the occurrence or identification of a failure but deliberately delayed due to resource or other operational issues.
- Predictive Maintenance. The most advanced approach to maintenance, predictive maintenance is based on a set of activities that detect changes in the physical condition of assets (signs of

failure) in order to carry out maintenance work. It maximises service life whilst reducing the risk of actual failure. There are two recognised classes of predictive maintenance.

- Condition Based. Centres on continuous and/or periodic condition monitoring to detect early signs of failure.
- Statistical Based. Focuses on statistical data from meticulous recording of performance and failure data. Predictions are constructed from the data.

Predictive maintenance is a complex system to establish but it may be possible for the Authority to begin to apply it through the use of Technology Forge CAAM system, the Authorities financial system and officer knowledge. It is an effective approach.

#### **Overview of Maintenance Methods**

Reactive maintenance is generally unavoidable, but it should be reserved for 'Emergency'; 'Incident' and/or 'Breakdown' only and should not constitute the primary approach for the Authority. A programme of planned (preventative) maintenance should be developed, a system which should minimise the need for reactive maintenance and limit it to 'Emergency and Incident' responses.

In developing the planned programme, an appropriate mix of all methods should be considered.

#### Accompanying WLDC Documents and schedules.

- 1. Maintenance Policy
- 2. Compliance Policy
- 3. Asset Management Policy
- 4. Strategic Asset Management Plan
- 5. Asset Utilisation Strategy

#### Schedule of the principal standards referenced.

- The Health and Safety at Work Act 1974 (abbreviated to "HSWA 1974", "HASWA" or "HASAWA") is an Act of the Parliament of the United Kingdom that as of 2011 defines the fundamental structure and authority for the encouragement, regulation and enforcement of workplace health, safety and welfare within the United Kingdom. The Act defines general duties on employers, employees, contractors, suppliers of goods and substances for use at work, persons in control of work premises, and those who manage and maintain them, and persons in general.
- 2. BS 3811:1993; provides guidance and definitions on maintenance, technical and administrative actions intended to retain an item in, or restore it to, a state in which it can perform a required function.
- 3. BS 8210:2012; Guide to Facilities Maintenance Management is for those with responsibility for facilities maintenance in most types of building-related facilities assisting those responsible for ensuring that facility assets continue to perform as intended.
- 4. ISO 55000, 55001 & 55002 are a suite of standards created to provide guidance in asset management practice. ISO 55001 focuses on helping you develop a proactive lifecycle asset management system. This supports optimization of assets and reduces the overall cost of ownership while helping you to meet the necessary performance and safety requirements. ISO 55002 provides the specific guidelines for the application of this system, in accordance with the principles set out in BS ISO 55000.
- 5. CIBSE Guide M Maintenance engineering and management
- 6. BSRIA Guide BG35/2012 Condition surveys and asset data capture

# Appendix 1

# BS 8210:2012 Maintenance Planning Process

