

SOP: Maintenance & Inspections

Effective Date: [Date]

Last Updated: [Date]

Department Responsible: Maintenance Department / Property Management

1. Purpose

This Standard Operating Procedure (SOP) establishes uniform guidelines to manage property maintenance and inspections effectively. By adhering to this SOP, we aim to:

- Preserve property value and appearance
 - Ensure tenant safety and satisfaction
 - Prevent costly repairs through proactive measures
 - Maintain compliance with relevant codes and regulations
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2. Scope

This SOP applies to:

- All properties under the company's management
 - All staff members, contractors, and vendors involved in maintenance and inspection activities
 - Scheduled and ad-hoc maintenance tasks, as well as routine and move-in/out inspections
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3. Definitions

- **Routine Inspection:** A scheduled review of a property's general condition to identify damages, safety hazards, or needed repairs.
- **Preventive Maintenance:** Regularly scheduled tasks designed to prevent breakdowns (e.g., HVAC servicing, plumbing checks).

- **Work Order:** A formal request for maintenance or repair work, logged and tracked in the property management system (PMS).
- **Vendor/Contractor:** External service providers (e.g., electricians, HVAC specialists, plumbers) performing specialized work not handled by in-house staff.

4. Roles and Responsibilities

Role	Responsibility
Chief Operating Officer (COO)	- Provides strategic direction and budget approvals for major repairs or capital expenditures.
Property Manager	- Oversees overall maintenance strategy at the property level. - Coordinates with Leasing, Finance, and Maintenance teams for budgeting and scheduling repairs.
Maintenance Manager	Plans and schedules routine inspections and preventive maintenance. - Assigns work orders to in-house technicians or vendors. - Ensures quality control and compliance.
Maintenance Technician	Performs day-to-day maintenance tasks and emergency repairs. - Documents findings and updates the work order status.
Vendor/Contractor	Provides specialized or large-scale services (HVAC, roofing, electrical). - Maintains required insurance, licenses, and permits.
Finance / Accounting	- Processes invoices, tracks maintenance costs, and manages budgets. - Works with Property Manager to forecast maintenance and capital expenditure needs.

5. Procedure

5.1 Routine Property Inspections

1. Inspection Schedule

- Create an annual or semi-annual inspection schedule.
- Communicate planned inspection dates to tenants at least 24–48 hours in advance, or as required by local regulations.

2. Inspection Checklist

- Use a standard form to document the condition of:

- Interior: walls, flooring, fixtures, plumbing, electrical systems
 - Exterior: roof, siding, landscaping, parking areas
 - Safety Elements: smoke detectors, carbon monoxide detectors, fire extinguishers (if applicable)
 - Note minor issues for future repairs and major issues for immediate action.
- 3. Documentation & Follow-Up**
- Record inspection findings in the PMS, attaching photos if possible.
 - Generate work orders for any necessary repairs or replacements.
 - Notify tenants of any scheduled repairs resulting from the inspection.
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5.2 Preventive Maintenance Scheduling

- 1. Maintenance Calendar**
 - Develop a recurring calendar for equipment checks and servicing (e.g., HVAC filters, water heater inspections, gutter cleaning).
 - Include seasonal tasks (winterizing, landscaping, pest control).
 - 2. Task Assignment**
 - Assign tasks to in-house Maintenance Technicians or approved vendors, depending on skill requirements.
 - Ensure tasks are logged and scheduled in the PMS to track completion.
 - 3. Quality Assurance**
 - After each preventive maintenance task, the Maintenance Manager reviews the work for completeness and compliance with safety standards.
 - Update equipment logs to reflect the date and details of maintenance performed.
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5.3 Work Order Management

- 1. Request Intake**
 - Tenants or staff submit maintenance requests through:
 - Online portal / property management software

- Email or phone call to the maintenance hotline
- Collect pertinent details (location, nature of the issue, urgency) and log in the PMS.
- 2. **Prioritization**
 - **Emergency (Priority 1):** Issues posing immediate risk to life or significant property damage (e.g., major water leak, gas leak, electrical hazards).
 - **Urgent (Priority 2):** Non-life-threatening but time-sensitive issues (e.g., broken appliance, HVAC outage).
 - **Routine (Priority 3):** General repairs with no immediate threat (e.g., minor leaks, cosmetic repairs).
- 3. **Approval and Assignment**
 - Maintenance Manager reviews requests and assigns them to appropriate technicians or vendors.
 - For high-cost repairs above a specified threshold, seek Property Manager or COO approval.
- 4. **Work Execution**
 - Technician or vendor completes the repair in a timely manner.
 - Document completed work, including materials used and labor hours, in the PMS.
- 5. **Verification and Closure**
 - Maintenance Manager or Property Manager verifies the quality of work (when necessary).
 - Close the work order in the PMS once the tenant confirms satisfaction or the manager verifies completion.

5.4 Vendor & Contractor Management

1. **Vendor Selection and Vetting**
 - Use pre-approved vendors with valid licenses, insurance, and references.
 - Solicit multiple bids for large projects to ensure competitive pricing and quality.
2. **Contracts and Service Level Agreements (SLAs)**
 - Define scope of work, deadlines, and performance indicators.
 - Negotiate payment terms and warranties for parts or labor.

3. Performance Monitoring

- Track vendor responsiveness, quality of work, adherence to budget and timelines.
- Conduct periodic reviews and maintain a preferred vendor list for future projects.

4. Invoice Processing

- Vendors submit invoices to Finance / Accounting with corresponding work order numbers.
 - Maintenance Manager verifies completion and cost.
 - Finance processes payment according to contract terms.
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6. Safety and Compliance

1. Personal Protective Equipment (PPE)

- Maintenance Technicians and vendors must wear appropriate PPE (e.g., gloves, safety glasses) for tasks involving potential hazards.

2. Regulatory Compliance

- Follow OSHA guidelines and local building codes.
- Acquire necessary permits for major repairs or remodels.

3. Hazard Reporting

- All staff must report any safety hazards discovered during inspections or maintenance activities immediately.
- Document hazards in the PMS and address them as priority repairs.

4. Emergency Preparedness

- Have an up-to-date emergency contact list for major utilities, emergency services, and preferred vendors.
 - Train staff on basic emergency response procedures (e.g., shut-off valves, electrical cut-offs).
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7. Documentation and Record-Keeping

1. Maintenance Logs

- Keep a digital log of all completed repairs, including parts used, labor hours, and associated costs.

2. Inspection Reports

- Store inspection checklists and any photographic evidence in the PMS.
- Maintain historical data to track recurring issues or high-risk areas.

3. Vendor Contracts and Certificates

- Retain active contracts, insurance certificates, and proof of licensing in a central repository.

4. Record Retention

- Follow the company's document retention policy (e.g., 3–7 years) or local legal requirements.

8. KPIs and Continuous Improvement

- **Response Time:** Measure the time between work order creation and technician assignment.
- **Resolution Time:** Track how quickly repairs are completed once assigned.
- **Maintenance Cost per Unit:** Compare actual vs. budgeted maintenance expenses.
- **Tenant Satisfaction:** Assess feedback after maintenance tasks (e.g., surveys or follow-up calls).
- **Frequency of Repeat Repairs:** Flag recurring maintenance issues to investigate root causes.

Regularly review these KPIs to refine maintenance strategies, optimize vendor selection, and update SOP procedures.

9. Training Requirements

- **Maintenance Staff:** Regular training on equipment handling, safety regulations, and new repair techniques.
- **Property Managers:** Updates on local building codes, environmental regulations, and best practices.
- **Vendors/Contractors:** Orientation on company policies, property access procedures, and work order protocols if they frequently service com-

pany properties.

10. Approval and Revision

Name/Title	Signature	Date
COO	[Signature/Initials]	[Date Signed]
Property Manager	[Signature/Initials]	[Date Signed]
Maintenance Manager	[Signature/Initials]	[Date Signed]
Finance Director	[Signature/Initials]	[Date Signed]

End of SOP