



# HOA & High-Rise Workbook

## 12 Questions to Assess Your Maintenance Plan

The way your association handles maintenance sets the tone for your community's reputation, your resident experience, and your legacy as a board member.

That's why having a solid maintenance plan or program is critical to your association's success.

Without a strong maintenance program (and without assessing your current maintenance program), you may face **shorter shelf life of valuable assets, higher living costs, greater frequency of emergencies, and a diminished reputation with residents** (e.g., if current equipment and utilities fall into disrepair or are not improved, your reputation will suffer).

Ready to assess your current maintenance plan? Schedule a meeting with your board and management company to discuss the following questions.

# 1. Do we have a maintenance plan?

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## « WHAT DOES A MAINTENANCE PLAN INCLUDE?

A true maintenance plan is both proactive and reactive. It includes all forms of maintenance, including preventive (e.g., maintenance performed to keep equipment running smoothly), repairs (e.g., maintenance performed to fix an issue), and replacement (e.g., asset needing to be replaced entirely).

## Ask the Expert

“ Having a strong and well-documented maintenance plan can be the difference between a well-run association and an association that’s prone to risk. As staff members change, a solid maintenance program will help new staff stay on top of equipment and asset maintenance and prevent surprise repairs.

Pepe Ramirez,  
Chief Engineer for LUMINA, San Francisco  
FirstService Residential



2.

**Is our maintenance plan or program documented?  
(And how is it documented?)**

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3.

**How detailed is our maintenance plan?**

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**« BUILDING  
A LEGACY**

Documenting your maintenance plan helps ensure that it will outlive the current board and provide clear direction to any future managers or staff. Make sure it's documented in a way that future staff members are able to easily and quickly access.

**« NO  
GENERALIZATIONS**

Using general terms to describe the areas you need to maintain (e.g., "first floor amenity spaces") is not a recipe for success. Your maintenance plan should have detailed descriptions of your assets, including make and model numbers, locations, and frequencies. This will help ensure that future maintenance associates, association managers, and staff understand what is required. A more specific and detailed plan leads to better and more consistent maintenance.

## 4. Does our maintenance plan have a mission statement?

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## 5. Is our maintenance program designed around manufacturer requirements and government codes?

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### « GOAL-ORIENTED

Yes, just like your association itself, your maintenance plan should have a credo, motto, or mission statement. This can help define the workload, increase associate engagement, and communicate the goals with the entire team. Your statement should also promote the health, safety, and well-being of your associates and residents.

### « EXCEEDING THE REQUIREMENTS

At a minimum, your association's maintenance plan should incorporate manufacturer's maintenance requirements, safety regulations from local and national fire and health departments, the Occupational Safety and Health Administration (OSHA), and the Environmental Protection Agency (EPA).

## 6. Do we have the right talent to handle our specific maintenance needs?

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### « FINDING THE RIGHT FIT

Every association is different. The complexity of a community's needs should match the talent level of your maintenance team. A complex high-rise with multiple systems and assets will have very different needs than a single-family home association. Your management company should help you find the right balance for your particular association based on your unique needs.

## Ask the Expert

“ Don't underestimate the importance of understanding your community's unique needs before establishing your maintenance program. If your community or high-rise has complex equipment and assets, you need to have maintenance associates that have the expertise and training to do the job well.

Pepe Ramirez,  
Chief Engineer for LUMINA, San Francisco  
FirstService Residential



**7. Does our community or high-rise require vendor outsourcing? What is the vetting process?**

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**8. Has our maintenance team been effectively trained on preventive maintenance and repairs for our association?**

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**« NICE TO MEET YOU**

How well do you know your vendors? Make sure that your association is partnering with highly vetted vendors and that your management company is obtaining multiple quotes.

**« START RIGHT**

Onboarding is critical when bringing a new maintenance associate up to speed on the intricacies of your unique community or building. Make sure you are working with a management company that has a solid HR and training department as well as relationships with vendors who can help assist with training with certain assets.

# 9. What system do we use to track preventive maintenance and repairs in our association?

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# 10. Are we taking our reserve study into account with our maintenance plan?

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## « AUTOMATE IT

Your management team and maintenance team should be well-versed in using the latest iterations of a Computerized Maintenance Management System (CMMS). Mobile functionality and ability to track users, assets, locations, preventative, and repair requests are critical for a successful maintenance plan. Trending and inventory control reporting are essential for keeping costs down.

## « WHEN TO USE RESERVES

Reserve funds are designed to fund non-recurring events like asset replacements (rather than day-to-day repairs) and maintenance inspections that don't occur every year. In the best scenario, when a piece of equipment or part of your facilities reaches the end of its useful life you would use your reserve fund to pay for the replacement. Also, if you have a large maintenance expense like a five-year sprinkler inspection, you can fund and track these expenses with a strong reserve plan.

# 11. How do we manage new projects (capital improvements)?

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# 12. What's our plan when emergency issues occur?

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## « DO OUR CAPITAL IMPROVEMENTS REQUIRE A PROJECT MANAGER?»

Most associations do not require a dedicated project manager unless they are undergoing multiple capital improvements or complex projects. In most cases, your lead engineer or maintenance person on staff will be the primary project manager. A good question to determine this is to ask, “How many projects are we planning on doing in a year?”

## « DIAL 911:

Whether it's a fire, flood, natural disaster, or a local community-wide emergency, make sure your association is prepared with an emergency plan. Your community manager and maintenance team should include preparations and maintenance for an emergency response, exit strategy, and all emergency protocols.



## Why a Great Maintenance Plan Matters

A strong maintenance plan can help preserve and enhance property values, mitigate unexpected costs, and help your association avoid emergencies and establish a strong reputation with residents.

Want additional help or guidance with your association's maintenance plan?



Contact us today to learn more:  
<https://bit.ly/Contact-Us-NV>

A close-up photograph of a person's back and shoulder wearing a large, light-colored straw hat with a decorative beaded band. The background is a bright blue swimming pool with white geometric lines overlaid on the water.

Life, simplified.