

# Developing a Maintenance Plan *In Four Steps*



## THE FIVE-YEAR HOUSING MAINTENANCE PLAN

### Essential for housing quality and durability

Developing and following a five-year housing maintenance plan is essential to preserving a community's housing investments.

Here are four steps you can follow to help you prepare and implement a maintenance plan for the on-reserve non-profit housing portfolio (Section 95):

#### STEP 1—GATHERING INFORMATION

Before you start to work on developing a 5-Year Housing Maintenance Plan, you must gather all the necessary information you will need. To prepare a Maintenance Plan for a certain Phase or project, you will need to answer the following questions:

##### **What are the available funds available for each year of the five-year plan?**

The base funds would come from the maintenance/repair portion of your Section 95 Operating budget. However, if you are planning some capital replacements (roofs, furnaces, etc.), you can draw additional funds out of the Replacement Reserve set aside for that Phase. Be sure to include any other funding being applied toward the repairs on this Phase (Band funds, CMHC's Residential Rehabilitation Assistance Program, etc.).

##### **What is the condition of each unit within the Phase?**

Consult your annual inspection reports, which will identify the repairs needed, the order of priority on the repairs, and an estimate of the cost for each repair item. This information is required to determine how much work can be accomplished within the budget available for each year of the 5-Year Housing Maintenance Plan to be developed.

##### **What are the goals and priorities?**

Knowing the priorities established by Chief & Council, as well as major community objectives, may impact your decision about what work should be done first.

## STEP 2—DEVELOPING THE PLAN

Now that you have gathered the information needed, choose a good time and place where you can work on the development of your 5-Year Housing Maintenance Plan - with undivided attention. Take some time to analyze the information you have gathered to ensure the most efficient use of the funds in completing the necessary maintenance and repairs on the houses.

Sometimes better prices can be obtained from contractors if similar repairs are being done to multiple units. For example, replacing 5 hot water tanks in one contract instead of one tank at a time.



### Your 5-Year Housing Maintenance Plan should identify funds to be spent on:

- **Regular maintenance and emergencies.** This would be an annual amount set aside per unit to address small routine maintenance items and to have funds earmarked for emergencies that will likely come up during the year;
- **Priority (short-term) repairs** that, due to health and safety or structural urgency, must be done within the first year of the Plan;
- **Existing Service Contracts** for such items as chimney cleaning, furnace servicing, or grass-cutting at the Elders' Complex;
- **Preventative Maintenance** items such as cleaning chimneys, HRVs, eaves-troughs and downspouts, and replacing furnace filters, etc. (some of these could be assigned as tenant responsibilities);
- **Mid-term repairs** that should be done within the first 2-3 years of the Plan; and,
- **Capital Replacements** that should be completed within the 5-year period covered by the Plan. These items could be paid for out of the Replacement Reserve set aside for this Phase.

Your planned expenditures must not exceed the funds available for each year of the Plan. If the funds are insufficient, you will need to obtain additional funds or postpone some work to the following year when new funds will become available.

## STEP 3—APPROVING THE PLAN

Presenting the five-year maintenance plan to Chief & Council for approval is important because:

- It promotes open communication and stronger relationships between the Housing Department and Leadership
- Gaining political support can give you the authority to move forward with the plan;
- It helps you move towards proactive, preventive maintenance.

## STEP 4—REVIEWING AND ADJUSTING THE PLAN

As unexpected things happen, you will likely need to make some adjustments during the course of implementing the Plan. For example, when an unexpected and urgent repair need arises, you may have to postpone an item or two on the current year’s plan to re-use the earmarked funds for the new priority. As another example, perhaps some of your actual costs have come in higher than anticipated, so you may have to postpone some less urgent items to the following year. These adjustments are not a failure but are just a normal part of implementing a Plan.

The current year of your Housing Maintenance Plan should be reviewed every three (3) months to verify progress on the planned work projects and to monitor the funds being spent in comparison with the funds budgeted for the work. Once a mid-year review is completed, this is a good time to provide a progress report to Chief & Council to keep them informed and on-side.



As Year 1 is completed, you revise your Plan by moving Year 2 up to Year 1, and so on. To do so effectively, you will need to perform new Maintenance Condition Reviews to determine and add and new priorities into your Plan. Remember: you never complete your Housing Maintenance Plan. It is an on-going process to help you maintain your community’s investment in housing.

**For more information on this and other housing maintenance topics, be sure to contact your CMHC Specialist.**

### CONTACT INFORMATION

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