

HOAMCO – *Best Practices*



Controls for Ensuring Maintenance Work is Done

The following are some common management controls for ensuring that maintenance work actually gets done in a timely manner.

1. **Maintenance Calendar:** This is a calendar or schedule that identifies what needs to be done during the year—and how frequently. An example of items that may be contained in a pool and maintenance calendar is attached.
2. **Maintenance record:** While the calendar tells you when maintenance ought to be done, the record tells you when it actually was done.

A separate maintenance record is useful when you contract work out. Use the records to verify that work was done before you pay any invoices. Including a budget and contract column in the maintenance record adds a financial control for the manager.

3. **Inspection checklist.**

Documents your current maintenance standards
Helps you to identify potential problems

4. **Inspection report:** An inspection report – commonly called a “punch list” – is a compilation of all maintenance needs identified during an inspection. Use it to:
 - Assign maintenance tasks to your staff or contractors
 - Budget for maintenance needs
 - Identify any preventive maintenance that needs to be done
 - Determine when on-site staff or independent contractors are not properly performing work on time

Attached are sample checklists from CAI that may be useful.

SAMPLE: Inspection Report or "Punch List"

Prepared: 1/11/XX

By: _____

10206

Adjust the rear door closer
Replace the split stair treads; several split stair treads
Repair the fresh air vent leak at top hallway rear
Top floor, replace the door closet bolts with the proper type
Cut off the hallway door; it drags on the carpet
Install fire alarm glass at front fire pool
Adjust the terrace room fire door so it doesn't hit the frame

10220

Replace the weather strip at the rear entry door
Lubricate the rear entry door
Install the proper bolts at the terrace level door closet
Replace several split stair treads
Re-secure the fire alarm at the front entrance
Lock the attic access

10228

Adjust the rear door so it closes properly
Replace the fire alarm glass at the rear entrance
Adjust the terrace level door closet
Replace the logo and the front entry glass
Replace the fire alarm glass at front entry

10240

Adjust the rear door so it closes properly	1/16/XX
Exit face missing at the rear entry	1/16/XX
Adjust or replace the terrace level door	1/16/XX
Reposition the emergency light at front entrance	1/16/XX
Replace split stair tread as needed	

SAMPLE: Grounds Maintenance Record 20XX

Item	No.	Budget	Contract	Mar	April	May	June	July	Aug	Sept	Oct	Nov																			
				WEEK				WEEK				WEEK				WEEK				WEEK				WEEK				WEEK			
				1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Cuttings	19	\$525	\$525		6 16 28	7 18 27	4 16 29	16 31	10 20 27	10 21	5 19	20																			
Edgings	4	\$293	\$293		6		4	31		21																					
Pruning Per Season	1	\$1574	\$1574				3 half payment			27 half payment																					
Spraying	10 hrs.	\$63/hr.	\$63/hr.	17 .5 hr 24 .5 hr	27 .5 hr			30 4.5 hrs	14 .5 hr	23 2.5 hrs	27 1.0 hr																				
Broadleaf	1	\$752	\$752				2																								
Crabgrass	1	\$746	\$746		3																										
Fertilization	1	\$539	\$539								22																				
Liming	1	\$908	\$908	15																											
Weedbed Control		Include w/ mulching	Include w/ mulching																												
Soil Test																															
Mulching	1	\$3071	\$3071 2/20 half	3 half payment																											
TOTALS				\$	\$																										

Note: This is a record for a nine-month contract.

SAMPLE: Pool and Spa Maintenance Calendar

ACTIVITY	FREQUENCY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Acid Wash	As needed					X							
Chemicals: Maintain Balance	Daily				X	X	X	X	X	X	X		
Chlorinators: Monitor/Inspect	Weekly				X	X	X	X	X	X	X		
Coping: Clean	Weekly				X	X	X	X	X	X	X		
Filters: Backwash	As needed				X	X	X	X	X	X	X		
Filters: Clean	Weekly				X	X	X	X	X	X	X		
Pool/Spa Tile: Clean	Weekly				X	X	X	X	X	X	X		
Pumps: Empty Lint Baskets	Weekly				X	X	X	X	X	X	X		
Pumps: Maintenance	Weekly				X	X	X	X	X	X	X		
Railings: Clean	Weekly				X	X	X	X	X	X	X		
Railings/Fence: Inspect/Tighten	Weekly	X	X	X	X	X	X	X	X	X	X	X	X
Safety Equipment: Maintain	Weekly				X	X	X	X	X	X	X		
Signage: Maintain	Ongoing	X	X	X	X	X	X	X	X	X	X	X	X
Skimmers: Inspect/Clean	Weekly				X	X	X	X	X	X	X		
Underwater Lights: Check/Replace	Ongoing				X	X	X	X	X	X	X		

Note: When a task is performed, fill in the date on the chart. Keep a copy of the chart in a pending file in the manager's office and an other copy on a clipboard at the pool.