



**FirstService**  
RESIDENTIAL



# HOA WORKBOOK

13 QUESTIONS TO ASSESS YOUR  
PREVENTIVE MAINTENANCE PLAN

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## 13 QUESTIONS TO ASSESS YOUR PREVENTIVE MAINTENANCE PLAN

Your HOA can't plan for *everything*.

However, a **strong preventive maintenance (PM) plan** will help you keep equipment and facilities in excellent condition, extend useful life, build up your association's reputation and enhance property values for years to come.

To strengthen or develop your PM plan, **schedule a meeting with your board and management company to discuss the questions and suggestions below**. For more insights, read the full article, *HOA Maintenance: Ask These 13 Questions to Assess Your Plan*: <http://bit.ly/Maint-13-CA>

## 1. DO WE HAVE A PREVENTIVE MAINTENANCE (PM) PLAN?

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### **RED FLAG!**

*In our [2019 HOA Health Assessment Survey Report](#), more than 25% of board members said that they either didn't have a PM plan, or relied on vendors to take care of it.*

## 2. IS OUR PM PLAN OR PROGRAM DOCUMENTED?

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### **DON'T SKIP THIS STEP**

*This step ensures that your maintenance plan will outlive the current board and any other managers or staff that need to be kept in the loop.*

## 3. DOES OUR PM PLAN REFLECT OUR HOA'S VISION?

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### **BACK TO BASICS**

*Your association's vision should be the foundation of any operational documents, including a PM plan or program.*

## 4. ARE WE TAKING OUR RESERVE STUDY INTO ACCOUNT?

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### **UH OH!**

*If the reserve study's estimated timelines do not align with your PM program, there's a good chance your program is outdated.*

## 5. HAS AN ENGINEERING SPECIALIST ASSESSED OUR EQUIPMENT?

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### **SUCCESS STORY**

*One association received a \$400,000 estimate to fix a major leak that they did not have the funds to cover. After FirstService Residential was brought on, they were introduced to an engineering specialist who provided a more cost-effective and efficient solution that was \$280,000 less than the original estimate.*

## 6. WHAT EQUIPMENT TESTING METHODS ARE WE USING?

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### **TESTING 101**

*Examples include vibration analysis, thermal imaging, plumbing stack inspection and sound testing.*

## 7. HOW OFTEN ARE WE INSPECTING FACILITIES AND EQUIPMENT?

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### **NOT AMATEUR HOUR**

*An engineering specialist can help you determine the schedule. Facilities and equipment should be tested frequently to ensure that they are operating in accordance with useful life.*

## 8. HAS AN ENGINEERING SPECIALIST ASSESSED OUR EQUIPMENT?

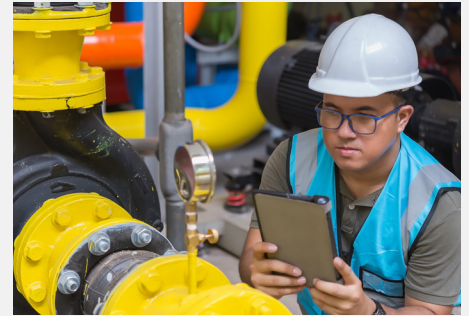
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### **A NEW LEASE ON LIFE**

*Continued maintenance and replacing parts with more efficient or higher-quality materials can help extend useful life (a manufacturer-provided estimate of the time a component will serve its original purpose).*

## 9. WHAT TYPES OF VENDORS DO WE WORK WITH?

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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.*

## 10. ARE ASSOCIATES REGULARLY TRAINED ON OUR PROCESSES?

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### HELPING HANDS

*Make sure that your engineers and maintenance staff have access to ongoing training and support in their day-to-day jobs.*

## 11. WHAT SYSTEM DO WE USE TO TRACK MAINTENANCE PROJECTS?

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### AUTOMATE IT

*When selecting a Computerized Maintenance Management System (CMMS), consider the number of users needed, the location where the application is hosted, mobile functionality and tracking inventory, work requests and scheduled maintenance.*

## 12. HOW DO WE RESPOND WHEN EMERGENCY ISSUES DO OCCUR?

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### DIAL 911:

*Emergencies happen. Make sure your association is prepared with documented staff training, exit strategy, equipment preparation and emergency protocol review.*

## 13. DO OUR PROJECTS REQUIRE THE GUIDANCE OF A PROJECT MANAGER?

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*“Enlisting the help of a project administrator or manager not only helps make your project more effective, but it relieves the burden on your manager to conceive, plan and execute on a project.”*

**—Anthony Martin,  
Project Manager,  
FirstService Residential**

# GET MORE

## MAINTENANCE BEST PRACTICES

*Download articles, guides and white paper here:*

<http://bit.ly/CA-HOA-Articles>



## WHY A PREVENTIVE MAINTENANCE PLAN MATTERS

A thorough preventive maintenance plan can help mitigate unexpected costs and repairs, saving your association money and helping preserve and enhance property values.

To learn more, read the full article, *HOA Maintenance: Ask These 13 Questions to Assess Your Plan:*

<http://bit.ly/Maint-13-CA>

## ABOUT FIRSTSERVICE RESIDENTIAL

FirstService Residential is North America's property management leader, partnering with 8,000 communities across the U.S. and Canada. HOAs, community associations, condos and strata corporations rely on our extensive experience, resources and local expertise to maximize their property values and enhance their residents' lifestyles. Dedicated to making a difference, every day, we go above and beyond to deliver exceptional service. FirstService Residential is a subsidiary of FirstService Corporation (FSV), a North American leader in the property services sector. Find out how we can help your community thrive.

For more information, visit [www.fsresidential.com/california](http://www.fsresidential.com/california).