

# Getting it right!

## Stock Condition Surveys and Planned Portfolio Maintenance



**TOM MCNAMARA  
& PARTNERS**

CONSTRUCTION COST MANAGERS  
PROJECT MANAGERS





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# The right steps...

Strong and proactive Asset Portfolio Management - which keeps pace with Regulation - requires effective governance, risk management, sinking fund provision and performance management policy and implementation. To this end, there is a requirement to undertake **Stock Condition Surveys (SCS)** and produce life cycle cost plans.

Tom McNamara and Partners have developed a proven methodology that streamlines the process, mitigates against the historical limitations of stock surveys and optimises the benefits.

## 1. The right rationale

The challenge is to find efficiency savings both in the cost of maintenance interventions and its management to continue to improve the quality of the existing stock in a way that is sustainable, and addresses the issues associated with climate change in line with Government policy.

We will help determine your particular requirements, for example:

### General

- Physical condition data capture.
- Fire Safety / Health & Safety / Minimum Rental Standards.
- Prioritising & planning repairs.
- Maintenance & improvement.
- Energy performance.

### Strategic

- Property information database to support policy and decision-making.
- Assisting applications for Funding Streams.
- Value for money by providing data on which to base maintenance strategies.
- Targeting scarce resources.

### Operational

- Moving from "Reactive" to "Planned" property maintenance.
- Rectifying deficiencies in minimum standards.
- Integrating backlog, planned & preventative maintenance.
- Identifying urgent day-to-day repairs.

## 2. The right team

Tom McNamara and Partners have a specialist in-house multi-disciplinary team with proven expertise in the delivery of Stock Condition Surveys and Planned Portfolio Maintenance.

- Andrew Warren:** Director - Project & Asset Management
- Gerard O'Malley:** Director - Whole Life Cost Planning and Maintenance Procurement
- Deirdre McShane:** Lead Building Surveyor
- Conor Cooney:** Lead Quantity Surveyor
- Noelle Finn:** Access Coordinator & Stakeholder Liaison

The team recently completed a tailored Stock Condition Survey of **Clare County Council's** Housing Stock, circa 2,500 units, for the purpose of assessing and planning their repair, maintenance and enhancement programmes. The team managed the access process for this 100% survey.

Key outputs were a defined methodology for categorising and prioritising works; a detailed condition survey and report of every property; a schedule of priority works; a whole life cost plan for each property; a "Cloud" based data storage and retrieval system; a system for tailoring reports per property, estate or area and by building element or component; the production of tailored schedules of works for tendering; a measured door and window schedule for each property to facilitate rapid tendering of window replacement; production of summary 30-year cost reports per property, estate, area or the whole portfolio and the tools to assist in the levelling out of that expenditure.

Key maintenance and enhancement standards were established to facilitate partial or interim upgrades that would meet defined standards of retrofitting and enhancement over the individual property's lifetime.

Tom McNamara and Partners also undertook a similar Stock Condition Survey of **Peter McVerry Trust's** Housing Stock (circa 250 units) but the process was tailored to address their specific requirements. This was a 50% plus stratified survey, used to estimate overall budgeting and sinking fund provision requirements.

## 3. The right survey

In the case of planned maintenance, a Stock Condition Survey (SCS) is used to identify maintenance need. The SCS typically provides a snapshot of the physical condition of the housing stock at a particular point in time from which a stock condition profile model is developed that predicts maintenance demand and the associated budget requirements over say 30 years and beyond. A rolling 12-month budget is also determined.

We design and specify a better approach that addresses the shortcomings of a typically procured SCS. A "live" system whereby the initial SCS is the foundation for the routine update of each property's individual whole life cost and condition reports, as works are carried out and properties are re-inspected. In this way the data remains "live" throughout the "properties" life. This provides the missing loop, which has been a critical failing of a typically procured SCS.

The options available to undertake a Stock Condition Survey are:

- 100% Survey
- Random Sample
- Stratified / Phased Survey

Ultimately if the primary rationale of the Stock Condition Survey is for budgeting and sinking fund provision, a Stratified / Phased Survey may suffice as an initial process where funding is not in place to undertake 100% Surveys.

If, however, definitive maintenance strategies and action plans are required, then 100% Survey is the appropriate course of action.

## 4. The right software

In conjunction with our strategic IT partners, our team use the latest iPad Surveying Technology and Cloud based data storage. Our mobile application provides an intuitive survey and inspection tool increasing speed and accuracy in the field.

- Our team are experienced in designing and building survey forms and templates to suit your organisational needs.
- The automatic data uploads increases data collection speed and gives you "always on" visibility across your portfolio.
- Dashboards and Reports - we are experienced at designing reports that help you to understand your data, forward spend budgets and share with stakeholders.
- Increase speed, accuracy, and quality of data collection and reporting.
- Our team will help you maintain a consistent brand, operational effectiveness, and safety standards across your entire enterprise.
- With our experience, we will ensure asset value is maintained and help you readily meet lease and statutory obligations.
- ISO 27001 accredited, the highest-level international data security standards.

## 5. The right delivery

Before any surveying commences, to ensure that your end requirements are met, we undertake the following:

- Our team agree the survey requirements with Client and prepare a "Survey Handbook" that defines the requirements of the survey. We will also agree key component lifecycles, redecoration cycles, planned preventive maintenance and inspections.
- We also prepare a "Costing Handbook" that defines base rates, factors in optimal procurement methods, regional variations. Risk factors for non-cyclical replacements e.g. number of properties that might require underpinning or other major structural repairs.
- The Costing Handbook shall include an agreed Maintenance and Enhancement Specification, including an agreed "Retrofit Specification". Thus, as elements or components are upgraded, we can price for the appropriate standard. This will also ensure that interim upgrades are to the optimum standard required.
- We design the survey templates and undertake a number of "Model" Surveys to test the survey template, the survey report and the cost plan.

We combine the latest project management and planning techniques with "leg-work" and focused communications to ensure that the high "access" rates are achieved. Key outputs include:

- An agreed Project Execution Plan.
- A detailed project schedule in Microsoft Project with monthly updates against the "Baseline" schedule.
- Agreed Monthly Progress Reports.
- Access Co-ordination Strategy, incorporating a Public Relations Strategy.

## 6. The right outputs

The Stock Condition Survey, if undertaken effectively, will result in better planning and will minimise the movement of goods, contractors, employees and the difficulty gaining access to people's homes to undertake maintenance work. The traditional approach of letting small individual contracts and the respective inefficiencies could be dramatically improved.

Collecting data in this way would also facilitate efficient procurement strategies with economies of scale. Term/Framework contracts based on schedule of rates could be established to rapidly reduce the lead-in period for carrying out maintenance works and upgrades, and for carrying out planned preventative maintenance.

For example specialists could be procured for: Fire and Carbon Monoxide detection; window and door servicing (fitting window restrictors); soffit, fascia and guttering; flat roofing specialists; other roofing specialists; decorators; mechanical and electrical contractors; window and door contractors; glaziers; external wall insulating contractors; roof insulating contractors; contractors capable of undertaking "deep" retrofits, and general maintenance requirements built into the Framework Agreements. These might include emergency response provision for urgent safety hazards found.

Having collected and analysed the data, Tom McNamara and Partners can provide the following services:

- Level out expenditure to avoid the peaks and troughs.
- Prepare 5-year planned maintenance and enhancement programmes.
- Advise on setting up "Term Maintenance Contracts".
- Procure planned maintenance programmes.





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