

Planned preventative maintenance (PPM) services

For use with the RICS Short Form of Consultant's Appointment for Designated Services

Additional notes

- These services should be completed by inserting a tick in the box next to the services to be provided. For further information, please refer to the RICS Short Form of Consultant's Appointment for Designated Services explanatory notes.
- All other services not ticked are deemed to be additional services under the terms of this appointment. Any bespoke services agreed between the client and consultant should be inserted in Section 11.
- Refer to Planned preventative maintenance, RICS guidance note.

1 General

- 1.1 Attend client, site and other meetings as provided under this agreement
- 1.2 Liaise with the client to determine the client's initial requirements and develop the client's brief.
Prepare technical and budgetary advice
- 1.3 Advise the client on specialist services, including specialist consultants and contractors.

2 PPM report

- 2.1 Provide a PPM report for (**tick for approval**)
 - 2.1.1 Landlord
 - 2.1.2 Tenant
 - 2.1.3 Owner/occupier
 - 2.1.4 Other (please specify)

Note: The building will be inspected from ground level or by using accessible means of entry. The roof will be accessed if safe to do so. No opening up of concealed parts will be undertaken unless specifically referred to.

3 PPM site survey

- 3.1 Conduct a visual inspection of the building's structure and fabric internally for the purpose of producing the PPM report
- 3.2 Conduct a visual inspection of the building's structure and fabric externally for the purpose of producing the PPM report
- 3.3 Conduct a visual inspection of external site areas and the boundaries of the building(s) for the purpose of producing the PPM report

- 3.4 Conduct a visual inspection of a **multi-let** building which will **not** include tenant occupied areas
- 3.5 Other (please specify):

4 Access

- 4.1 Inspect the external elevations from ground level, accessible roofs and other suitable advantage points using binoculars
- 4.2 Inspect the external elevations and roofs using high-level access platforms/cherry pickers
- 4.3 Inspect the external elevations using window cleaning cradles. A qualified operator for the window cleaning cradles to be provided by the client or vendor
- 4.4 Inspect the external elevations and roof using an unmanned aerial vehicle (UAV)
- 4.5 For large and/or repetitive buildings, such as hotels or apartments, agree with the client the number or percentage of units to be inspected

5 Statutory compliance

- 5.1 Undertake a high-level review to ascertain whether the building(s) complies with legislation relevant to the use of the building and provide a brief report (note: this is not a full statutory compliance or access audit)
- 5.2 Undertake a high-level review to ascertain whether the building(s) has any obvious deficiencies with the requirements of the relevant accessibility legislation, building regulations, or codes pertinent regulations or statutes, relevant to the use of the building(s) and provide a brief report (note: this is not a full statutory compliance or access audit)

6 Building services inspection

- 6.1 Undertake a high-level building surveyor's cursory visual review of building services to ascertain those present, and highlight any obvious defects and need for further specialist inspections
- 6.2 Conduct, or procure a mechanical and electrical services engineer to conduct, a visual inspection of the mechanical, electrical and public health service installations
- 6.3 Incorporate inspection findings into a report (where the inspection is not undertaken by the consultant, the mechanical and electrical services engineer is to be employed by the client)

7 Sustainability

- 7.1 Undertake, or procure a sustainability consultant to undertake, a sustainability audit of the building(s).
- 7.2 Incorporate audit findings into a report (where the sustainability audit is not undertaken by the consultant, the sustainability consultant is to be employed by the client)

8 Documentation review

- 8.1 equipment inventory (manufacturer and commissioning date)
- 8.2 structural alterations
- 8.3 O&M manuals and health and safety files
- 8.4 guarantees or warranties (manufacturer and installer)
- 8.5 local issues such as boundary disputes or flooding, storms and earthquake damage
- 8.6 leases, sub-leases and alteration licences
- 8.7 maintenance inspection reports for service installations, access equipment or roof-mounted equipment such as lightning conductors or life safety systems
- 8.8 compliance reports (Building permission
- 8.9 fire safety and engineering (including fire risk assessments)
- 8.10 energy audits or energy performance
- 8.11 mandatory statutory maintenance reports

- 8.12 health and safety audits
- 8.13 water hygiene and Legionella reports
- 8.14 asbestos inventory and asbestos removal
- 8.15 access audits
- 8.16 investigation / treatment of deleterious materials
- 8.17 any existing condition surveys

9 PPM schedule and cost reporting

- 9.1 Provide a PPM schedule where component or elemental costs are generated by calculating the quantity, multiplying this by the rate and apportioning the relevant unit. This will include taking some check measurements or dimensions to generate the approximate quantities used to calculate costs. The rates can be taken from price books, online cost data sites, or in-house cost databases that are derived from historic project costs or with costs obtained by consulting professionals, colleagues and contractors.

10 Report delivery

- 10.1 Confirm by telephone and/or email, within 48 hours of inspection, the Consultant's main findings and summarise these in a draft executive summary document
- 10.2 Provide a PDF copy of the PPM schedule/report to the client electronically by email or via download from a nominated internet site
- 10.3 Provide hard copies of the final version of the report; agree the number required and its distribution

11 Bespoke additional services

- 11.1 Enter or attach bespoke additional services agreed with the client