

## **PROPERTY MANAGEMENT PORTFOLIO**

### **Recommendation:**

This document is currently being developed by the Head of Parks and Estates. The input of Finance and Properties Committee is sought

Contractor selection questions (for Homebase) and other prospective Property Management Companies.

Depending on what Wallingford Town Council' requirements are, a selection as taken from the below may be selected to include in the tender invitations following consultation and understanding of full requirements.

Questions that Wallingford Town Council may wish to consider prior to arranging a new agreement and preparing tenders for invitation set out below.

Does the Council wish to keep as is currently. One company to manage landlord/ tenant tenancies etc.

The same Company to manage Property Management.

Does the Council wish to keep the entire agreement in house?

Does the Council wish to separate elements of the current arrangement?

For example. Landlord and Tenant duties. Keep with a specialist proven certified professional.

Property Management. Day to day repairs, Planned Preventative Maintenance, Capital Works, all constructional and elemental building issues. Tender and employ a suitable professional company who specialise in maintaining historic buildings and estates with a frame work of specialist heritage contractors.

Bring the Property Management element of maintaining the estate in house and utilise individuals' specialisms to plan and manage, compliance and statutory duties, planned preventative and scheduled works, capital works etc.

All specialist works of a heritage nature to be planned and managed by the Estates Team, from initial feasibility, specification, tender action, commencement, completion, handover.

Possible questions to be included in The Expression of Interest Invitation when drafting tender invitations.

Are you aware that construction and building works necessitate duties under the CDM Regulations and other Statutory Acts. Are you able to discuss this and provide details?

What current arrangements do you have in place for Managing contractor works?

How will your company supervise work undertaken on the Clients estate by your contractors? Provide examples please.

What checks do you make on equipment/ materials/ quality?

Do you request copies of written H and S contractor policies. Please provide a copy.

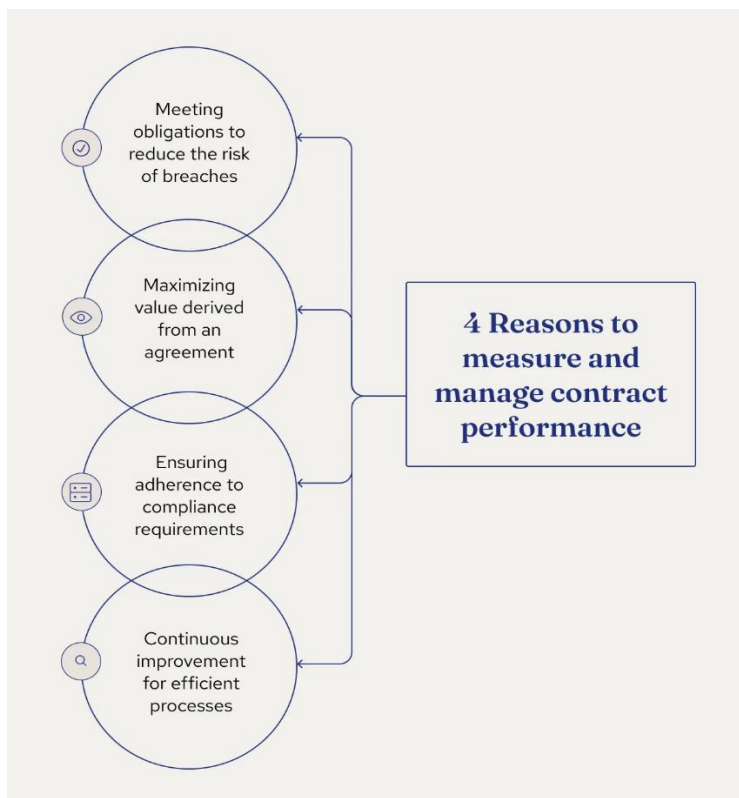
Provide details of RAMS for works recently undertaken. When are these requested and what is your process for approval and submitting to the client.

Provide qualifications, trade and professional for contractors in your employment/ framework. Provide examples of what is requested.

How do you manage contractor Performance?

Contractor Performance Management. CPM

Do you follow a similar guidance as example below? Provide worked examples of management of contractor performance please.



Are the clients' requests clearly understood and how do you define your clients clear expectations to your contractors?

What processes do you have in place to meet the clients expectations, meet obligations and reduce the risk of breaches. Provide examples. Please refer to a recent instance when working in a tenanted property.

How do you track your contractor's performance. Provide an example from a recent project.

How do you deal with delays in a project and mitigate the tenant within a property who is unhappy with delays and performance at no inconvenience or additional cost to the client?

How do you deal with a contractor breach in their legal obligations. Provide an example from a recent project.

Do you set realistic KPI's and have regular meetings and renewals if KPI's are not met? Provide examples.

What measures do you have in place to ensure that the contractor is meeting their compliance requirements? What would you include within your Expression of Interest invitation to prospective contractors to undertake works for Wallingford Town Council? Specific statutory requirements, legal obligations, industry guidelines, Best practice. Please broaden.

Why is it important to hold a pre start meeting?

Do you hold an initial pre start meeting with all the stake holders? Provide a recent example with questions that may have been raised by tenants in whose home, work was being undertaken.

Did the contractor follow a set methodology that involved regular monitoring, evaluation of any failings and any attempt to improve performance. Examples please?

How do you as a property company strive to improve your service to the client and measure yourselves? Examples please.

What forms of agreement do you have in place with contractor' contracted to undertake works. Would forms of agreement would you employ when working on Wallingford Town Council' unique estate?

Please add further should you wish to.

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