

**A**

Acknowledging the request, 106  
 Administrative assistants, 10, 15  
 Aesthetics, 20  
 After-hours requests, 114  
 Aluminum cans, recycling, 80-81  
 Annual maintenance plan in analyzing expense categories, 38  
 Annual management plan, 90  
 Annual preventive maintenance, 28  
 Anticipated data in analyzing expense categories, 38  
 Apartments  
   exterior inspection report of, 22-26  
   interior inspection report of, 96-99  
   turnover of, 3  
 Assets  
   maintaining, 2-3  
   managing, of client, 120  
 Assistant managers, 10, 15  
   in conducting inspections, 21

**B**

Benchmarking, 42, 83  
 Bidder's conference, 65  
 Bidding process, 45-47  
 Biweekly preventive maintenance, 28  
 Budgeting. *See also* Maintenance management budget  
   cash flow projections and, 91  
   zero-based, in analyzing expense categories, 38  
 Building engineers, 75  
 Building envelope, 29  
 Buildings  
   economic life of, 2  
   physical life of, 2  
   value of, 4-5  
 Building technicians, 75-76

**C**

Capital expenditure, 39  
   budget/actual report, 87  
   five-year plan, 41  
 Capital expenses, differences between maintenance expenses and, 39  
 Capital improvement plan, 34  
 Carbon footprint, 83  
 Cardboard recycling, 80  
 Cash flow, 1, 5  
   projections and budgets, 91  
 Client, managing assets of, 120  
 Co-employment, 63  
 Code of Professional Ethics, 117-122  
   adhering to code, 121-122  
   conflict of interest, 119-120  
   managing assets of client, 120  
   duty to tenants and others, 121  
 Commercial tenants  
   types of maintenance impacting, 93  
   working with, 93-95  
 Common areas, renovation projects in, 101  
 Communication  
   with property owner, 85-92  
     annual management plan, 90-91  
     budget and cash flow projections, 91  
     major renovations, 86, 89  
     management reports, 85-86  
     meeting with, 91-92  
     unbudgeted maintenance expenses, 89-90  
   providing positive, 100-101  
 Competition in real estate industry, 3-4  
 Computerized maintenance management system (CMMS) database, 68  
 Condition and age, 20  
 Conflict of interest, 118-119  
 Construction phasing timetable, 88  
 Consultants  
   hiring, 29  
   scope of work of, 29-30

Continuous Services Agreement, 47  
Contracts. *See* Maintenance contracts  
Coordination of notice, 94  
Corrective maintenance, 5, 28  
Corrective repairs, 69, 74-75  
Cosmetic maintenance, 5, 27-28  
Cost/benefit analysis, 36  
Curb appeal, 3-4, 20-22, 28, 36

## D

Daily preventive maintenance, 28  
Daily updates, posting, 95, 101  
Day matron/day porter, 76-77  
Deferred maintenance, 27  
Draft specifications and drawings, 29-30

## E

Economic life, 2  
Electronic messages, 105  
Elevator maintenance, 94  
Emergency contact lists, 67-68  
Emergency maintenance, 27-28  
ENERGY STAR ratings, 83  
Ethical self-tests, 117, 122  
Ethics  
    code of ethics, 117  
    defined, 117  
    family test for, 122  
    in maintenance management, 117-122  
    professional, 117, 119, 121  
Executive managers, 9-10, 15, 17

## F

Family test for ethics, 122  
Feedback, eliciting, from tenants and residents, 110  
Fiduciary, property manager's role as, 118  
Five-year capital expenditure plan, 41

Formal customer service surveys, 110  
Front-page test for ethics, 122  
Funds, assessing amount of available, 34-35

## G

Glass recycling, 81  
Government involvement in safety issues, 2  
Green buildings, 3

## H

Historical data in analyzing expense categories, 38  
Hold period, 33-35  
HVAC repair, 94

## I

Immigration Reform and Control Act (1986) (RICA), 54, 63  
Initial inspections, 19  
Inspections, 19-31  
    assessing insurance risks, 31  
    conducting, 19-21  
    determining maintenance needs through, 22, 27  
    draft specifications and drawings, 29-30  
    duration of, 20-21  
    focus of, 20  
    forms for, 22  
    frequency of, 20  
    hiring consultants, 29  
    identifying problem areas, 29  
    mode of, 21  
    of older properties, 20  
    personnel conducting, 21-22  
    proactive, 21  
    reactive, 21  
    regular, 19  
    reviewing warranties, 30-31  
    of shopping centers, 20  
    staff availability and, 20  
Insurance, assessing risks, 31  
IREMFIRST forums, 46

**J**

Janitorial services, 45, 47, 59, 67, 80, 82-83

**L**

Landlord responsibilities, determining, 2, 62, 95, 110-113

Landscape services, 45

Landscaping, sustainable, 81-82

Large tenant moving, 94

Leasing, 3

**M**

Maintenance

- agreement on, 48, 57-66
- corrective, 28
- cosmetic, 28
- cost of poor, 1
- deferred, 27
- determining needs of, through inspections, 22, 27
- emergency, 27-28
- forms on CD-ROM, 123-128
- handling calls, 104
- routine, 27

Maintenance contracts, 45-66

- agreement overview, 48, 57-66
- bidding and awarding, 6, 65-66
- bidding process, 45-47
- ensuring protections and standards, 47-48

Maintenance expenses

- differences between capital expenses and, 39
- unbudgeted, 89-90

Maintenance line, 104

Maintenance management, 1, 8

- ethics in, 117-122
- planning calendar for, 33, 69
- software programs for, 5, 115-116

Maintenance management budget, 33-43

- assessing amount of available funds, 34-35
- building your, 35-36
- establishing priorities, 38-43
- property owner's goals and objectives, 33-34

Maintenance management plan, roles in developing and administering, 9-17

Maintenance management program

- importance of, 1-8
- operating, 5-6
- reasons for developing and operating an effective, 2
- supervising, 67-83
  - emergency contact lists, 67-68
  - on-site personnel, 75-76
  - proximity and oversight, 78-79
  - schedules, 68-69
  - sustainable practices, 79-83

Maintenance managers, role of, in conducting inspections, 21-22

Maintenance personnel, 15-16

Maintenance plan, 5, 10, 29, 33-43

Maintenance request log, 106

Maintenance requests, 103-116

- receiving and responding to, 103-104
- using website for, 106

Maintenance schedules, 68-69

Maintenance technicians, role of, in conducting inspections, 21-22

Major renovations, 86, 89

Management reports, 85-86

Marketing, 3

Material safety data sheets (MSDSs), 61

Mechanical systems, 29

- replacement of, 28-30

Metal cleaning, 47

Monthly preventive maintenance, 28

**N**

Notice of Substantial Completion (sample document), 101

**O**

Older properties, inspections of, 20

One-Time Services Agreement, 47-56

Online and e-mail response options, 105-106

On-site maintenance personnel, 75-76

Owner reports, 85-86

## **P**

Parking lot seal and repair, 94

Pass-through clauses, 113

Physical condition checklist, 11-20

Physical life, 2

Portfolio managers, 20, 35, 42

Power upgrades, 94

Predictive factor, 72

Prenuptial paragraph, 63-64

Preventive maintenance, 28

    annually, 28

    biweekly, 28

    daily, 28

    monthly, 28

    quarterly, 28

    weekly, 28

Preventive tasks, 69, 72, 74

Priorities, establishing, in developing maintenance management budget, 38-43

Priority expenses, 34

Proactive inspections, 21

Problem areas, identifying, 29

Property

    minimizing possibility of injuries on, 2

    type and location of, 20

Property condition assessments (PCAs), 29

Property managers, 10

    in conducting inspections, 21

    as fiduciary, 118

Property owners

    communicating with, 85-92

        annual management plan, 90-91

        budget and cash flow projections, 91

        major renovations, 86, 89

        management reports, 85-86

        meeting with, 91-92

        unbudgeted maintenance expenses, 89-90

    goals and objectives in budgeting of, 33-34

    meeting with, 90-91

Proximity and oversight, 78-79

## **Q**

Quarterly preventive maintenance, 28

## **R**

Reactive inspections, 21

Real estate industry, competition in, 3

Real estate investment, asset of, 1

Record keeping, computer software programs for, 36

Recycling programs, 80-81

Regular inspections, 19

Renovations

    major, 86, 89

    projects in common areas, 101

Request for proposal (RFP), 45-46, 66

Residential maintenance project, notice required for, 100

Residents

    determining responsibilities of, 110-113

    working with, 95, 100

Reusable microfiber, 83

Roof repairs, 94

Rotation in cross training managers, 22

Routine maintenance, 27

Routine work, 69

## **S**

Safety issues, government involvement in, 2

Scope of work, 60-65

    consultants, 29-30

Service contract, response-time provision in, 67, 74, 77, 79

Shopping centers, 3-4

    inspection of, 20

Software

    maintenance program, 5, 115-116

    for record keeping, 36

Spreadsheets, 36

Staff availability, inspections and, 20

Stone cleaning, 45

Sustainable landscaping, 81-82

Sustainable practices, 79-80

## T

Teleconferencing, 91

Tenant improvements, 94

allowances for, 39, 41

Tenants. *See also* Commercial tenants

determining responsibilities of, 110-113

ethical duties to, 121

retention programs of, 3

surveys for, 95

Third-party contractors, 77-78

Transferable warranty, 30

Trash enclosures, 41

## U

Unbudgeted maintenance expenses, 89-90

Unit turnover costs, compiling, 36

Utility personnel, 76

## V

Value of building, 5

Voicemail message, 104

## W

Warranties

reviewing, 30-31

transferable, 30

Website, using, for maintenance requests, 106

Weekly preventive maintenance, 28

Work orders, 106-109

documenting, 108

following up on, 109-110

resolving, 111

## X

Xeriscaping, 80, 82

## Z

Zero-based budgeting in analyzing expense categories, 38