**MAINTENANCE REPORTS**

The following are questions to be considered in the development of a useful summary of maintenance activities. It is recommended that the summary or report be for a specific period of time, monthly being the most appropriate. It is not intended that the maintenance manager preparing the report would address every question every month although certain items such as service requests should be reported consistently. Other questions are intended to provoke a thought process so that pertinent issues will be addressed.

A. Service Requests

How many service requests were received during the period from all sources?

How may incomplete service requests were carried forward from the prior period?

Taking into consideration prior and current month’s service requests, how many are completed?

Of those service requests that are incomplete, what is the status of them, either in categories or individuals? i.e. work date scheduled, parts ordered, bids requested, require approval of expense

Of the service requests received, what specific types of work were more prevalent (i.e, plumbing, electrical, irrigation, drainage, leaks, HVAC, etc.)?

Are any types of requests on the increase?

How many service requests received required the services of an outside contractor?

During the period, how much time was devoted solely to completion of service requests, including preparation and clean up?

Does your experience with the recent service request work lead you to any new conclusions or recommendations?

In what form, from whom (owner or tenant) and how are service requests being received?

i.e. three-part service request form provided by management, letter from owner, telephone call, email. Have all telephone requests been recorded as service requests?

How many service requests are received directly on-site vs. sent to management office and forwarded to maintenance staff on site?

B. Contractors and Service Providers

With regard to regular service contractors, such as pool, landscape, laundry equipment, garbage removal -- do you have any concerns regarding frequency of visits, quality of service, follow up on specific requests?

Are you able to reach the contractors, designated manager or supervisor as needed? Do they check in with you on a regular basis?

With regard to service providers contracted on an as need basis, are you comfortable that you have relationships with qualified providers available when needed including after hours emergencies? Do you have a desire to develop any new relationships? If so for which service types?

Were any major projects in process during the month? If so, which ones, how are they going? When will they be completed?

C. Resident Contacts

Outside of specific requests for service, are you frequently contacted by owners and residents with questions they have about their specific unit or the property in general.

What are your perceptions about the type of questions you are getting? Are they issues you are knowledgeable about?

Are you typically able to give a definite answer or do you need to refer them to others? If so, who are they referred to?

Do you keep any notes about your contacts with residents?

Have you observed any rules violations? Has any action been taken on-site or was it referred to management? Novato P.D.?

D. Money and Administrative Issues

Are you handling any coin or card laundry transactions? If so, quantify your involvement and time spent.

Does the property have a minimum level of supplies on hand to address on-going business without delays?

Does the property have an adequate level of open accounts with suppliers? Are any new accounts needed?

How many individual purchase orders were issued during the period? Is this typical or unusual?

Have you reviewed the prior month’s expense codings to make recommendations for appropriateness and accuracy? Do you want to make any recommendations?

E. General

Do you have the tools typically needed or are you recommending any new tools be obtained?

Is the property being influenced by outsiders of any kind? i.e. vandalism, break ins (homes or cars) any kids hanging around? Have you observed any criminal activity on the property? Drug related malicious mischief, graffiti?

Have there been any changes in daily janitorial needs? Do you have any recommendations for changes in schedules?

If you are supervising additional on-site staff, are there any personnel or performance issues you are concerned about?

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