

Preventative Maintenance Plan **“To Do” List**

1. _____ **Create the Preventative Maintenance Plan.**
 - By law, the plan must include the Association’s Common Elements.
 - Best Practice Tip 1: The plan should cover all association-maintained improvements.
 - Best Practice Tip 2: The plan should require regular inspections of all association-maintained improvements and written summaries of those inspections.
 - Best Practice Tip 3: Contemporaneously create a Maintenance Chart for the homeowners.

2. _____ **Follow the Preventative Maintenance Plan.**
 - Retain qualified professionals (contractor, engineer, etc.) to inspect all association-maintained improvements.
 - Best Practice Tip 4: Liability! The board and its management company should not do the inspections.

3. _____ **Review and Act on the Inspection Summaries.**
 - After inspections have been conducted, review the written summaries and follow up with the inspectors as necessary to determine whether any maintenance work is recommended.
 - Prioritize recommended maintenance work from most important to least important.
 - Determine budgetary constraints.
 - Obtain competitive bids for the work.
 - Select a contractor to do the work.

4. _____ **Document the Work.**
 - Retain inspection summaries for six (6) years.
 - Document completion of maintenance work and keep records of same for ten (10) years.
 - Best Practice Tip 5: If you don’t have a Records Retention Plan, create one!

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