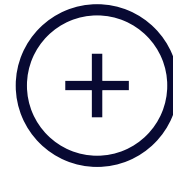


CapEx & Planned Preventative Maintenance (PPM)

Also known as Long-term Maintenance Plans, these are professional reports delivered by a building surveyor that allocates costed plans for repairs and renewals across an asset or estate. Enabling effective property maintenance and management, a CapEx plan helps clients control spend, plan ahead and protect long-term asset value.

Our expert team gives landlords, managing agents and building owners the insight and structure they need to maintain their buildings effectively over a period of time.



How SRVO adds value

Ensuring future repairs and upgrades are budgeted, justified and delivered in line with lease obligations, health & safety, and industry best practice.

Intelligent long-term maintenance planning

- ⊕ Clear, tailored strategies that prioritise works, reduce reactive spend, and support service charge compliance
- ⊕ A reliable forecast of future costs — to inform capital works programmes, manage leaseholder expectations, and protect investment value

Compliance and control

- ⊕ Greater accountability under the RICS Service Charge Code, by demonstrating proactive, well-documented asset management
- ⊕ Support compliance by aligning with lease obligations, health and safety duties, and cyclical maintenance requirements

Data-led decisions

- ⊕ Applying real-world survey data, today's construction prices, and future-facing cost indices — to provide a fully phased, inflation-adjusted view of required works over a timeframe



Why it matters

- ⊕ Supports compliance with upcoming RICS guidance
- ⊕ Enables accurate budgeting and long-term forecasting
- ⊕ Reduces cash calls and reactive maintenance spend
- ⊕ Improves leaseholder confidence and engagement
- ⊕ Enhances saleability and investment value

Helping you plan with confidence, nationwide

Our experienced team helps property owners and managers take a proactive approach to maintenance planning — with reports backed by qualified surveyors and real-world costing insight.

We're an independent property advisory and surveying business operating across the length and breadth of the UK.



srvo+



How do we deliver a CapEx or PPM plan?

Review — initial review of as built information, building and compliance information and maintenance records.

Condition survey — Detailed inspections across the estate, including external areas, roofs, plant, common parts and services, to assess the current condition and capture planned or ongoing works.

Stakeholder engagement — Site visits and liaison with managing agents and resident directors to understand recent works, current issues and future priorities. Being available to run through the completed document and address any queries.

Costed and phased 5, 10 or 20-year plans

- ⊕ Fully costed works schedule with prioritisation, phasing, and service charge apportionment
- ⊕ Reflects cyclical maintenance obligations, health & safety requirements and lease terms
- ⊕ Forecasts are indexed using building cost data to reflect inflation over time

Custom reporting — plans are tailored to your portfolio and presented in a format that supports budgeting and service charge recovery.

What is the right level of detail for my asset?

We tailor the level of detail within a CapEx plan or PPM to reflect the specific needs of the asset or landlord.

Depending on the size, scale and complexity of the estate, or the long-term asset or investment plan, we are able to provide the right level of detail to ensure clarity, confidence and certainty in budgeting and planning for the asset.

- ⊕ **Comprehensive:** Typically, 10- or 20-year plans that include a full condition report, review of lease obligations and full costed schedule aligned to the building reserve funds. Can also include specialist input on the building M&E Services.
- ⊕ **Light:** 5- or 10-year plans suited to smaller sites, or short-term timeframes, where a simple bullet point summary on condition is required whilst still providing the costed schedule but with more grouping of the building elements

Get in touch

To learn more, please contact
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To arrange a quote, please raise a request through Dwellant and our team will respond within 3 working days.



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