

VII. Preventative Maintenance

Per ARS §41-1091 B: This substantive policy statement is advisory only. A substantive policy statement does not include internal procedural documents that only affect the internal procedures of the agency and does not impose additional requirements or penalties on regulated parties or include confidential information or rules made in accordance with the Arizona Administrative Procedure Act. If you believe that this substantive policy statement does impose additional requirements or penalties on regulated parties you may petition the agency under Arizona Revised Statutes section [ARS §41-1033](#) for a review of the statement.

~~Per ARS §15-2002: Each school district shall develop routine preventative maintenance guidelines for its facilities. SFB Staff shall inspect school buildings at least once every five years to ensure compliance with routine preventative maintenance guidelines with respect to construction of new buildings and maintenance of existing buildings. The school facilities board shall randomly select twenty schools every thirty months and inspect them pursuant to this paragraph.~~

A. District Plans

~~There are seven identified Preventive Maintenance categories as shown in Exhibit Item VII.A:VI. A. HVAC, Roofing, Electrical, Plumbing, Surfaces, Special Systems, and Special Equipment. There are 50 Preventive Maintenance checklists within these seven categories. Each checklist identifies a major building component within the category. SFB staff will assist each district in selecting the appropriate checklists to use for their respective schools. The District's Preventive Maintenance Plans will dovetail with the District's Building Renewal Plans.~~

B. Description of Tasks

~~Each of the seven categories contain multiple tasks to be completed quarterly, semi-annually, or annually.~~

C. Life Cycle of Equipment

~~Information of the life expectancies of equipment is provided in Exhibit Item VII. C.VI. B. The useful lives of the listed items vary directly with their initial quality and level of maintenance. The list is based upon good quality components and a level of maintenance over the useful life that is consistent with manufacturer specifications.~~

D. Reporting (Modified May 3, 2007)

~~A reporting form Exhibit Item VII.DVI. C., completed for each district school, will list the number of preventative maintenance guideline tasks completed during the reporting period for the seven PM categories against the total number of recommended tasks for the approved plan. The number will be put into a report to compare the schools in a district, between districts statewide, or amongst similar geographic features or size. Each District's preventative maintenance plan reporting period will be the fiscal year from July 1 thru June 30 of the following year. Each District will submit it's preventative maintenance report to the School Facilities Board by November 1st of each year. The reporting form will be submitted to SFB on~~

~~an annual basis signed by: District Governing Board President, District Superintendent, and Facilities Manager~~

~~E. Non-Compliance as a Result of the Inspection~~

~~If the SFB staff determines, during their 5 year inspection process, the District is in non-compliance, the district will explain the non-compliance and provide a recovery plan to bring the district into compliance. The actual PM checklists will be completed by building and filed for each school within the District. The respective SFB Liaison will review these PM files when they inspect the school.~~

~~F. Use of Building Renewal Monies~~

~~A school district is authorized to use up to eight (8) percent of its annual building renewal formula amount for routine preventive maintenance, but such monies may not supplant maintenance expenditures from other sources. The SFB may require a school district to use building renewal eight (8) percent set aside for preventive maintenance if the SFB finds during an inspection that the District has not adequately maintained its facilities pursuant to the adopted guidelines.~~

~~G. Inspections~~

~~SFB will randomly select twenty school districts every thirty months and do a complete Preventive Maintenance Guideline audit.~~

A. Preventative Maintenance Definition

As used in this policy, preventative maintenance means services that are performed on a regular schedule at intervals ranging from four times a year to once every three years and are intended to extend the useful life of a building system and reduce the need for major repairs (see A.R.S. 15-2031 N 2). Please see the PM task sheets for specific examples.

B. Preventative Maintenance Categories and Tasks

There are seven building system categories (Adopted June 5, 2003) as listed below:

1. HVAC
2. Roofing
3. Electrical
4. Plumbing
5. Surfaces
6. Special Systems
7. Special Equipment

(See Exhibit VI. B. for a list of building components average life cycles.)

For each system, the School Facilities Board has identified equipment types and a corresponding list of appropriate PM tasks for that specific equipment. The SFB Executive Director may designate each task as either required or recommended. SFB staff will review the lists of tasks at least once every two years to determine the appropriateness of the tasks.

C. District Preventative Maintenance Plans

A school district that operates a school facility shall inventory each school building to identify the equipment associated with the respective PM category. This completed equipment inventory with the associated PM tasks approved by the SFB constitutes the district PM plan. (See Exhibit VI.A.)

Updates to the established PM plan should be submitted as follows:

New schools funded by the SFB: School districts constructing new space with SFB funds must submit an updated PM plan that includes the new facility before the SFB authorizes construction.

Space funded by school districts: School districts that construct either new space or replacement space shall include an update to the PM plan that includes the new space with the New Square Footage Report submitted to the SFB on September 1.

Other equipment changes: School districts that add or eliminate equipment should update the established PM plan each year by November 1.

D. District Reports

Each school district with an established preventative maintenance plan shall report to the SFB by November 1 of each year the number of PM tasks completed in the prior fiscal year. The SFB Executive Director shall establish the format for the report. (See Exhibit VI.C.)

E. Inspections

The School Facilities Board will randomly select 20 districts to be inspected for PM every 30 months. By September 1 of each year, the SFB Executive Director will present to the Board those districts inspected during the prior fiscal year, the selected districts that remain on the list and a list of randomly selected districts to replace those inspected in the prior fiscal year. The SFB Executive Director may schedule any district at any time during the 30-month period.

The preventative maintenance inspection shall determine if the district has the administrative structure for consistent preventative maintenance in place. The inspection shall also determine if the district is current on the required PM tasks.

The SFB Executive Director shall present to the SFB a report based on the inspection. The report will identify the level of compliance with both the required and recommended elements of the established PM plan. If the district is not in compliance with the required elements of the PM plan, the Executive Director will include recommendations on the use of building renewal dollars to bring the district into compliance. The SFB may grant the district one year to establish compliance before building renewal use is required. The final inspection report will be presented to the school district and published on the SFB website.

F. Building Renewal Use for Preventative Maintenance

Preventative Maintenance

If required to bring the district into compliance with the established PM plan, the SFB may require a district to use up to 8 percent of the formula amount of building renewal dollars for preventative maintenance. If required, the district may only use this portion of their building renewal dollars for preventative maintenance. Any other use would be considered an inappropriate use even if the use were an appropriate building renewal expenditure.