

VII. Preventative Maintenance

Per A.R.S. §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 ARS §41-1033 for a review of the statement.

A. Preventative Maintenance Definition (Adopted September 4, 2008)

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 (Adopted September 4, 2008)

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 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. 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 (Adopted September 4, 2008, Modified November 14, 2012)

A 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:

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New schools funded by the SFB: 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 districts: 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 October 15.

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

D. District Reports (Adopted September 4, 2008)

Each district with an established PM 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.

E. Inspections (Adopted September 4, 2008, Modified November 14, 2012)

The Board will randomly select 20 districts to be inspected for Preventative Maintenance every 30 months. The SFB Executive Director will present to the Board completed Preventative Maintenance Inspection Reports, the selected districts that remain on the list and a list of randomly selected districts to replace those that have been inspected. 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 in place for consistent preventative maintenance. The inspection shall also determine if the district is current on the required PM tasks.

The SFB Executive Director shall present to the Board 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 SFB Executive Director will include recommendations on the use of building renewal dollars to bring the district into compliance. The Board may grant the district one year to establish compliance before use of building renewal dollars is required. The final inspection report will be presented to the district and published on the SFB website.

F. Building Renewal Use for Preventative Maintenance (Adopted September 4, 2008)

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.