
MAINTENANCE PROGRAM GUIDELINES

Subject: Maintenance Plan Program Policy
Approval: Commission Resolution 04-16
Code Section/Reference: ORC Chapter 3318
Owner: Program Services

Policy Number: PS-03
Originally Issued: March 2004
Revised: November 2016; December 2017

APPLIES TO

CFAP, ENP, VFAP, and Accelerated Urban Programs

Maintenance Plan Development Process

A Commissioning Agent will serve as an expert to assist the School District in creating a preventive maintenance and capital planning program for newly completed facilities. The Commission has a list of firms who are pre-qualified as Commissioning Agents. The cost of Maintenance Plan Basic Services provided by a pre-qualified Commissioning Agent is an eligible expense of the project budget. Services provided by a non-prequalified individual or firm in preparing a plan for the maintenance of completed facilities is an eligible expense of the School District's Maintenance Fund.

The Project Manager will initiate the Commissioning Agent selection process for developing a preventive maintenance and capital planning program prior to Program of Requirements development. A best practice recommendation is that the Maintenance Plan Consultant is functioning when the Owner Project Requirements are being developed.

Maintenance Plan Objectives

The Maintenance Plan will include, without limitation, the following information:

1. Brief description of the building with components
2. Current operations and maintenance budget analysis;
3. Complete maintenance budget including initial, annual and long-term expenditures (year by year revenue and expense projection over 23 years);
4. Maintenance schedule for every major facility component requiring maintenance;
5. List of products, equipment and other resources needed for each activity;
6. Staff requirements and training needs;
7. Method for documenting the maintenance performed;

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8. List of contacts for the district to call for each building component (warranty vs. service contracts);
 9. Recommendations to improve operation and maintenance services.

Approval of Maintenance Plan by Commission

A School District's Maintenance Plan for the newly completed facilities must be reviewed and approved by the Commission. Factors that will be taken into consideration by the Commission in evaluating a School District's Maintenance Plan for approval include, without limitation, the following:

1. Amount of funds available in the Maintenance Fund;
2. Replacement/repair of facility components as a function of life cycle cost;
3. A balanced allocation of funds within the plan categories.

The following plan categories, in order of priority, have been established for the use of the Maintenance Fund:

1. Out-sourced service contracts and/or in-house training for basic systems (HVAC, life safety, elevators, roof systems);
2. Equipment for maintenance of the facilities; and
3. Replacement/repair of facility components.

Resolution of the Board of Education

The Board of Education will be required to acknowledge the following:

1. Allowable uses for the Maintenance Fund shall be the maintenance including preventive maintenance and both planned and emergency repair of the facility, staff training, equipment service contracts needed for replacement of facility components, and expendables (air filters, control sensors, belts etc.), as recommended for the assets in the approved plan;
2. Maintenance and janitorial/custodial staff salaries, utility costs, equipment supplies and personnel associated with the day-to-day housekeeping and site upkeep per normal and customary standards are not allowable expenditures under the parameters of the Maintenance Fund;
3. The actual use of the Maintenance Fund according to the terms of the approved Maintenance Plan is subject to audit;
4. A five (5) year Capital Plan should be updated on an annual basis, while the complete Maintenance Plan should be updated each five (5) years and approved by the Board.