

# 3.0

## Maintenance and Operations Administrative Guidelines for School Districts and Community Colleges

### General Maintenance and Operations Guidelines

This section establishes several basic guidelines for managing maintenance and operations programs at educational facilities. These guidelines are not intended to conflict with, but rather complement, new and existing policies, practices, and procedures that are in use at the local school district and individual community college.

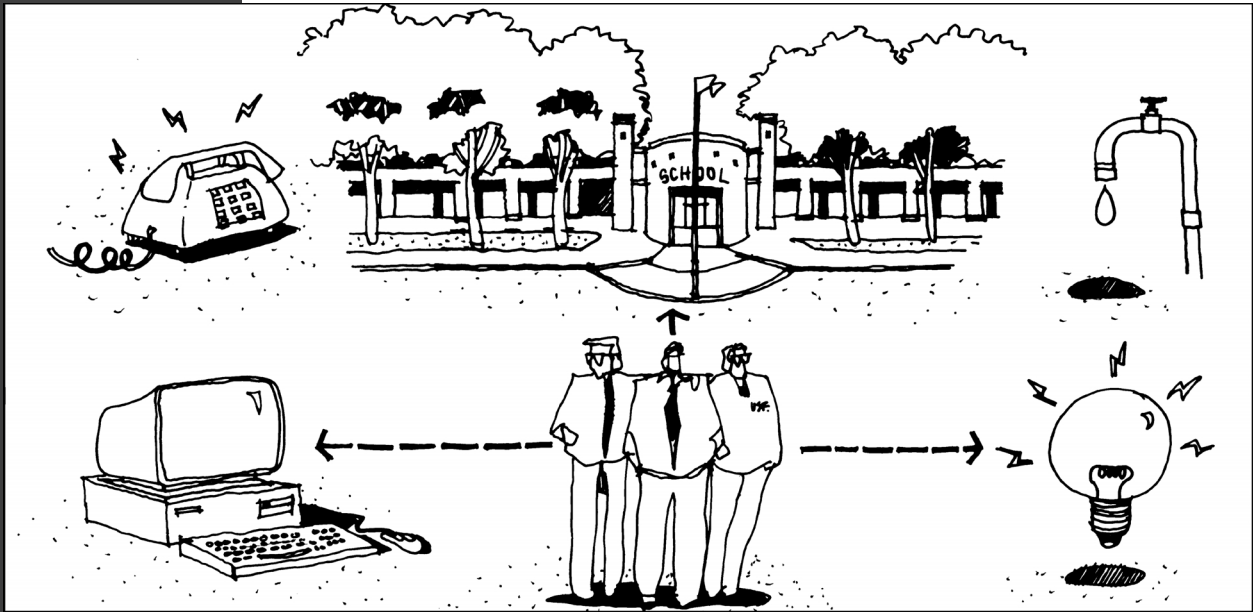
These guidelines and recommendations are ultimately aimed at helping educational facility managers and supervisors operate maintenance and operations programs in the most cost-effective, efficient, and productive manner possible. In doing so, the recommendations outlined in this document define parameters for a broad range of general administrative and managerial activities and responsibilities specifically related to the State's educational facilities physical plant. Among others, these guidelines address the following areas of educational facility maintenance and operations:

- Maintenance and operations management responsibilities
- Fiscal responsibility
- Facility standards
- Strategic planning
- Building manuals

# 3.1

## Maintenance and Operations Administrative Guidelines for School Districts and Community Colleges

### Maintenance and Operations Management Responsibilities



The management of educational facility physical plants involves three major areas of responsibility. These areas are mutually complementary in purpose and are absolutely critical in supporting both the process of learning and the educational delivery system.

Facility management area	Responsibilities
<p><b>Building and equipment maintenance</b></p>	<p>This function includes maintaining and operating an educational facility’s mechanical (i.e.,HVAC, plumbing, elevators, etc.), electrical (i.e., main service, distribution, lighting, etc.), structural, technical, and life safety systems. In addition, this function also addresses individual building components, such as walls, roofs, windows, doors, ceilings, and floors.</p>

<b>Facility management area</b>	<b>Responsibilities</b>
<b>Custodial operations</b>	This function involves the cleaning and sanitizing of educational, ancillary, and auxiliary spaces. These areas include general classroom spaces, specialized instructional spaces, rest rooms, support spaces (e.g. offices, libraries, media centers, cafeterias), and other ancillary spaces and auxiliary facilities. Typical tasks associated with this function include cleaning and vacuuming, trash disposal, minor maintenance, light bulb replacement, replenishing supplies, and a variety of other general housekeeping duties that are required to keep educational facilities clean, sanitary, and comfortable.
<b>Grounds maintenance</b>	This function involves maintaining the exterior environs of educational facilities in a safe, orderly, clean, and visually appealing manner in support of various educational activities. Grounds maintenance focuses on such areas as sports/athletic fields, playgrounds, parking lots, lawns, plazas, and water features.

**Figure 3.1: Three Areas of Educational Facility Management.**

For each of the above-mentioned activities, administrators should establish and adopt guidelines for their implementation with clearly defined roles and responsibilities for each member of the maintenance and operations department. Although the scope of work associated with each activity will vary, depending on the age, size, and design of each facility, administrators should define the type and level of services that will ensure smooth school/college operations and a high degree of customer satisfaction.

In addition to these services, maintenance and operations organizations are faced with basic business management responsibilities such as:

- Personnel hiring/recruitment
- Staff development/training
- Budgeting
- Payroll
- Work authorization
- Parts/supplies inventory management
- Warehousing

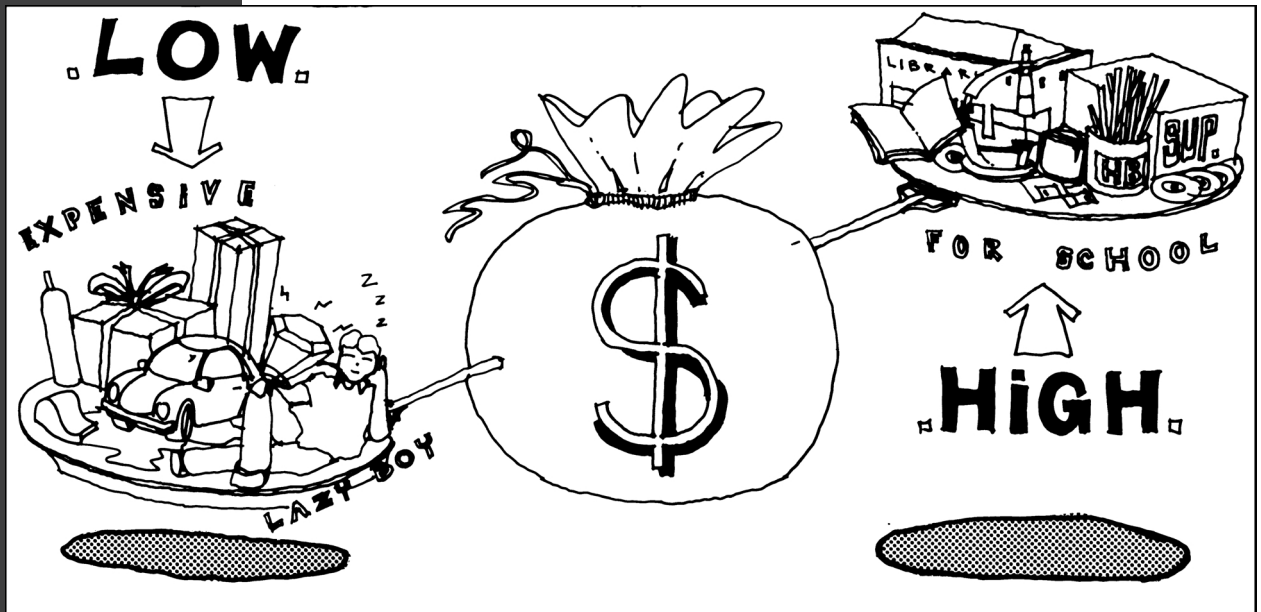
More recently, the responsibilities of the maintenance and operations organizations have been expanded even further in some instances to include:

- Purchasing
- Transportation/vehicle maintenance
- Strategic planning
- Outsourcing
- Construction coordination
- Disaster preparedness and crisis management
- Security
- Customer relations

# 3.2

## Maintenance and Operations Administrative Guidelines for School Districts and Community Colleges

### Fiscal Responsibility



Facilities administrators have a professional and fiduciary responsibility to plan, implement, and oversee maintenance and operations activities that are in the best interests of the general public, the educational institution, and its governing board. In doing so, managers must also endeavor to protect the state’s and district’s capital investment in school facilities.

Although maintaining and operating new educational facilities in a cost effective manner begins with established Board policies, it also includes educational specifications and continues through the design and construction phases. As a practical matter, administrators should coordinate facility management programs that are broad-based, fiscally sound, and ensure operating efficiencies on a continuous basis.

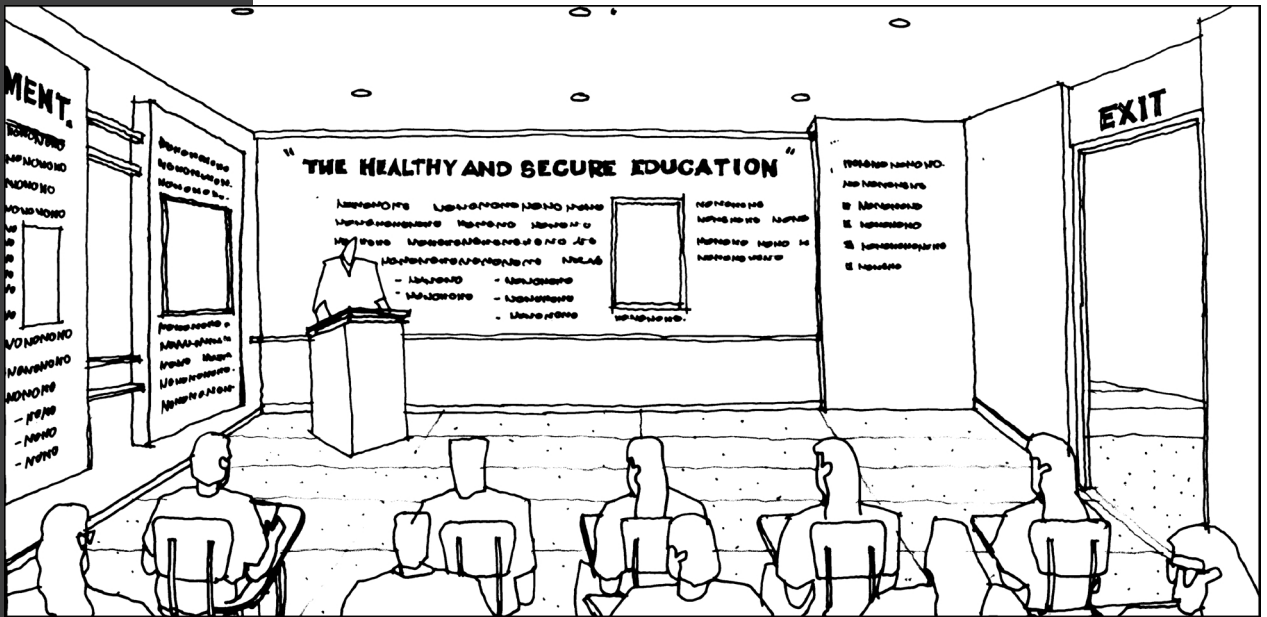
In addition to these goals, the Florida Legislature has established a system for reviewing financial management practices at educational facilities throughout the state. Briefly stated, this system is intended to encourage the use of performance and cost-efficiency measures, use benchmarks and industry standards, identify opportunities for cost savings, and link

financial planning to educational priorities. These guidelines identify seven general goals, a number of “best practices” measures, and a number of performance indicators that pertain to maintenance and operations organizations at all educational facilities. For detailed information on these maintenance and operations administrative fiscal responsibilities, see “Best Financial Management Practice Reviews,” 2000, published by The Florida Legislature - Office of Program Policy Analysis and Government Accountability.

# 3.3

## Maintenance and Operations Administrative Guidelines for School Districts and Community Colleges

### Facility Standards



School facility administrators should operate and maintain educational physical plants to accommodate students and staff, facilitate the learning process, and promote a healthy and secure school environment. All work tasks, activities, and other efforts associated with maintenance and operations departments should be focused on creating circumstances that allow for the maximum utilization of school facilities.

In order to realize this objective, acceptable standards for each educational facility's functional performance, safety, sanitation, physical condition, and appearance should be established by individual school districts and community colleges. In the absence of pre-existing Board-established standards, administrators should develop standards that are appropriate for facilities they manage and submit them for review and approval by officials in the school's central administration. The ultimate intent of these standards is to establish baseline criteria and benchmarks for maintaining and operating educational facilities which, at a minimum, reflect the expectations of the educational facility customers, school administration, government officials, and the taxpaying public. This criteria also

forms the basis by which maintenance and operations administrators can plan and implement new programs, modify existing ones, measure effectiveness, and gauge customer satisfaction. Standards for overall facility conditions should not be confused with general work standards, which define the manner in which individual services or tasks are completed. These standards are discussed later in section 6.6, Measuring Worker Productivity.

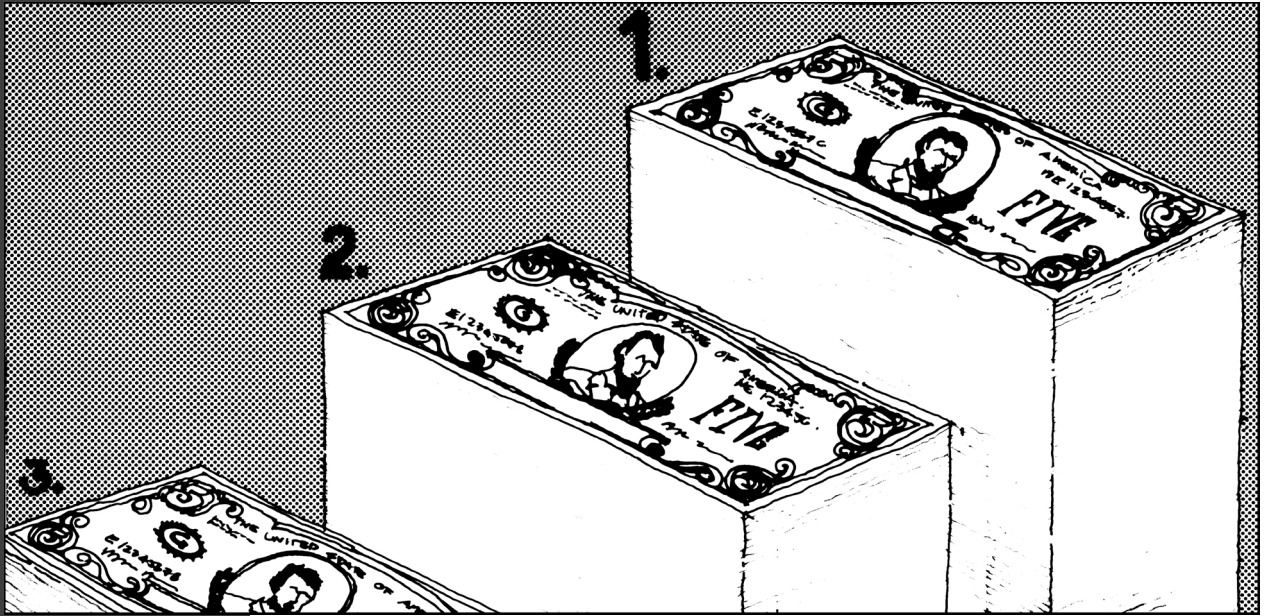
<b>Facility Standards</b>	<b>Maintenance and Operations Criteria</b>
<b>Safety</b>	Educational facilities shall be maintained to create a safe learning environment that is free of environmental hazards and occupational risks for students, staff, school administration, and the general public.
<b>Sanitation</b>	School and community college buildings shall be cleaned on a daily basis to promote public health and ensure sanitary conditions, especially in classrooms, rest rooms, laboratories, cafeterias, kitchens, clinics, locker rooms, and other areas prone to germs, bacteria, and disease.
<b>Security</b>	Educational facilities shall be maintained in such a manner to protect occupants, property, and equipment from vandalism, theft, intrusion, and natural disasters.
<b>Functional Performance</b>	Maintenance and operations activities shall ensure that buildings, grounds, and equipment facilitate the educational process and function in an economical and efficient manner.
<b>Physical Condition</b>	Maintenance and operations activities shall ensure that all buildings, components, and equipment are sound, in good serviceable condition, and otherwise in good working order.
<b>Appearance</b>	Educational facilities shall be maintained to achieve the desired level of appearance specified or expected by a school district's or community college's central administration.



## 3.4

## Maintenance and Operations Administrative Guidelines for School Districts and Community Colleges

## Strategic Planning



Educational trends and growth in enrollment in Florida's public schools and community colleges will continue to have a dramatic effect on the ways in which educational facilities are designed, built, used, and maintained well into the twenty-first century. One of the most promising ways that maintenance and operations administrators can keep abreast of how these changes are likely to affect their departments is to develop management strategies for providing effective services in support of the educational delivery process. Although not an entirely new concept or development in the facilities management industry, strategic planning has proven to be a successful approach in meeting the challenges that lie ahead.

The essential purpose underlying any strategic planning process is to make informed decisions today that will help define future circumstances. It incorporates practical notions and rational actions that are intended to be proactive or "visionary." The strategic planning process for maintenance and operations organizations should build on existing departmental strengths while seeking to overcome weaknesses through the introduction of qualitative improvements in all aspects of operations. While there is no standard format for

implementing a strategic plan, the process generally involves a multi-step procedure that includes the following tasks:

- Definition of the Department's mission and clarification of the strategic planning intent.
- Identification of current strengths and opportunities.
- Assessment of the challenges and limitations likely to be encountered over a period of time.
- Determining the desired outcome or results.
- Defining the most effective methods for achieving them.

In most instances, the central administration of school districts and community colleges may already have an academic strategic plan or facilities master plan in place. However, many of these plans may be vague with regard to the maintenance and operations of buildings and grounds, and may only identify broad goals that could be interpreted in a variety of ways. Administrators should assess all existing plans to determine the institutional basis for a more thorough strategic plan for educational facilities management.

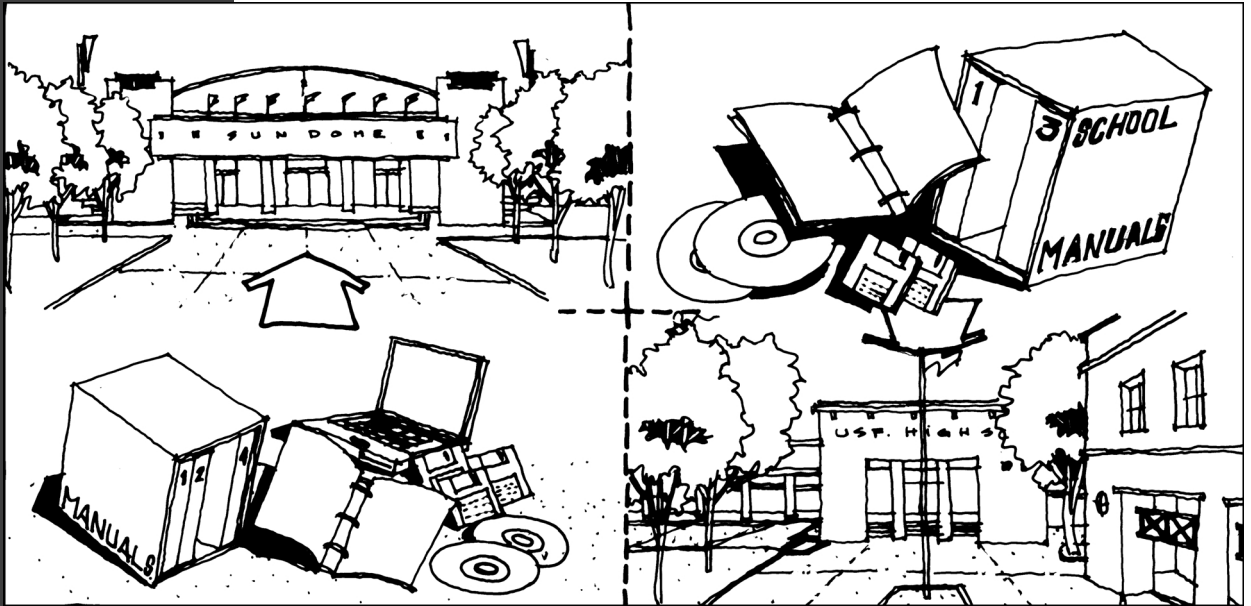
The major components of any strategic plan should address the particulars of a school district or community college, as well as a range of other general issues. Some of the most important aspects of a comprehensive strategic plan are as follows:

- Integration of the maintenance and operations plan with the institutional academic and master plan.
- Introduction of innovative approaches for improved asset management.
- Alternative methods for financing building improvements, equipment purchases, and hiring additional staff.
- Methods to increase productivity and reduce costs.
- Strategies for achieving greater customer satisfaction.
- Consideration of alternative service delivery systems.
- Identification of innovative methods and practices, and technological advancements that would allow for increased productivity and reduced operating costs.

## 3.5

## Maintenance and Operations Administrative Guidelines for School Districts and Community Colleges

## Building Manuals



School districts and community colleges should develop building manuals for each structure in their facility inventory. These manuals are intended for use, both at the local level and at the district or central administrative level. These manuals should be updated annually and used as firsthand references for identifying key characteristics, operational histories, and potential problem areas of individual buildings. In many instances, these manuals may be maintained in an electronic format to facilitate ease of updating and information sharing as needed. Among other features, these manuals should contain the following information:

- Photographs of overall facility site, individual buildings, and other key site features. These images should also document new construction, renovations, building additions, equipment installations, etc. After this work is completed, graphic information should be updated on a periodic basis.
- Scaled drawings (or construction documents): as-builts, site plans, surveys, floor plans, elevations, pedestrian networks, vehicular areas, landscaped areas, utility locations, adjacent conditions, etc.
- Space inventory plans.

- Data relevant to the Florida Inventory of School Houses (FISH) report.
- Interior finish/space conditions plans.
- Roof condition surveys.
- Manufacturers guidelines for the proper installation, operation, and maintenance of special equipment and building components.
- Videotapes of equipment maintenance procedures.
- Equipment operation and maintenance logs.
- Critical building information and procedures.
- Current/future problem areas.
- Emergency information and procedures.
- Key personnel and contacts.