



FY 2025 Comprehensive Maintenance Plan Instructions

Interagency Commission on School Construction

Comprehensive Maintenance Plan Instructions

Record of Changes

<u>Version</u>	<u>Description</u>	<u>Published Date</u>
1.0	Initial Publication	5/27/2022
2.0	Added more details or definitions to various content for clarification; Updated Method of Submission; and Added to Required Data Elements: A.1.a) CMP Checklist A.8.f) PM plan B.3.c) Percentage of custodial tasks in CMMS C.2) List of all buildings and total GSF C.4.b) Identify categories covered by O&M budget C.4.c) CRV	2/28/2024

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Glossary

Definition of terms and acronyms used in this document:

Acronym or Term	Definition
Capital maintenance	Major repair, alteration, and replacement of building systems, equipment, finishes and components, including their removal and disposal, that sustains or extends the useful life of the entire facility but is insufficient to result in the facility becoming "like new."
CIP	Capital Improvement Program
CMMS	Computerized Maintenance Management System
CM	corrective maintenance
CMP	Comprehensive Maintenance Plan
Corrective maintenance	Work performed to return a degraded or failed system or piece of equipment to an operational condition within the tolerances or limits established for in-service operations.
CRV	Current Replacement Value, which equates to the gross square footage of the facility multiplied by the IAC's current cost per square foot for new construction (available in the most recent year's APG-CIP Instructions at www.iac.maryland.gov)
EFMP	Educational Facilities Master Plan
FTE	full-time equivalent
GSF	gross square feet
IAC	Interagency Commission on School Construction
LEA	Local Education Agency
Maintenance	The work required to keep a facility (plant, building, structure, ground facility, utility system, or other real property) in such condition that it may be fully functional and continuously utilized for its expected lifespan, for its intended purpose, and at its maximum energy efficiency. Includes both routine and capital maintenance.
Mean Time	The number of days elapsed between the creation of a work order and its completion.
M&O	maintenance & operations
PM	preventive maintenance
Preventive maintenance	The planned and regular inspection and servicing of equipment and systems in order to achieve the full expected lifespan and prevent prematurely degraded performance, premature failure, unplanned downtime, and related avoidable costs.
PD	professional development
WO	work order

Purpose

The purpose of the annual Comprehensive Maintenance Plan (CMP) is to communicate to the Local Education Agency's (LEA's) stakeholders, including the State, the LEA's intentions for the coming fiscal year for its facilities-maintenance program.

Background

Under COMAR 14.39.02.18, each LEA must annually update and submit to the IAC a Board-approved CMP that is compatible with its local educational facilities master plan (EFMP) and its local capital improvement program (CIP). The IAC requires that each LEA submit a CMP so that the IAC may

1) evaluate the degree to which the LEA is planning the activities that should contribute to maintaining learning environments that are healthy, safe, and educationally sufficient for all of the students that the LEA serves;

2) evaluate the degree to which the LEA is planning the activities that should maintain its facilities in a condition that will ensure that the LEA obtains the appropriate facilities longevity and value from the local and State investments made to date; and

3) evaluate and compare each LEAs' maintenance planning both over time and across the state in a manner that supports the identification of best practices that the IAC can then share with all LEAs.

To ensure that each CMP provides the full needed value to the LEA, its stakeholders, and the State, the IAC here establishes minimum content requirements for CMPs in a table-of-contents format that is intended to provide clear guidance to LEAs. The objective is to obtain the information that the IAC requires in a low-effort format that allows LEAs to publish and submit the IAC-required information as well as other LEA-selected information. On March 30, 2021, the IAC shared with LEAs the draft list of data elements to be required in future LEA CMPs and requested feedback and input. Between that date and late June, a number of LEAs provided feedback or input on the draft list. The IAC took that feedback and input into account in developing these instructions.

Deadline for and Method of Submission

Email the final CMP along with proof of Board approval to the Facilities Maintenance Group Manager, Lead Facilities Assessor, and the Schools Facilities Maintenance Groups Assistant by October 15, 2024. Hard copies are not accepted.

Required Format

The LEA may provide the required data listed below within any reasonable format, including that of the LEA's standard or traditional CMP. The IAC prefers Word or Excel document formats but accepts PDF documents.

Required Data Elements

For the FY 2025 CMP submission, it is understood that LEAs' data collection, accounting, and reporting differ and that some of the data elements below may not have historically been collected, tallied, or generated or are not currently available for various reasons. In light of this, the IAC may exercise flexibility at its discretion to accept a CMP that does not necessarily meet all of the specified requirements. If the LEA expects to submit such a CMP, LEA staff should notify the Facilities Maintenance Group Manager in advance and collaborate to identify appropriate modifications.

In addition to the CMP document, the LEA shall submit proof that the Board of Education approved the CMP that is being submitted, including the date on which that approval took place.

A) Introduction and Supporting Information

- 1) A completed CMP checklist directing the reader to each required data element.
- 2) Guiding Principles: A statement of the principles and/or values that guide the LEA's maintenance of its facilities.
- 3) Vision: A description of the desired outcome/situation that its facilities-maintenance group is working to achieve.
- 4) Mission: A statement of the mission of the LEA's facilities-maintenance organization/group/division/department.
- 5) Interrelationships: A description of how the CMP interrelates with the LEA's Educational Facilities Master Plan (EFMP) and other relevant documents.
- 6) A description of the long-term (strategic) focus of the LEA with regard to maintenance of its portfolio of facilities.
- 7) A description of the near-term (next one to three fiscal years) focus of the LEA with regard to maintenance of its portfolio of facilities.
- 8) Computerized Maintenance Management System (CMMS)
 - a) The name of the software package being used by the LEA to manage its maintenance.
 - b) A list of the CMMS modules or components being used and for what primary purposes.
 - c) Whether or not the CMMS is being used to manage and track the work of contractors (non-LEA staff) engaged by the LEA to perform maintenance work.
 - d) The percentage of preventive-maintenance work orders that are generated automatically within the CMMS pursuant to PM schedules entered into the CMMS.
 - e) The percentage of facilities (active, holding, and administrative) for which all major building systems and components are tagged and entered into the asset inventory within the CMMS.
 - f) LEA-wide PM plan, including frequencies.
- 9) Facilities-Assessment Process
 - a) A brief description of how the LEA assesses its facilities (e.g., for condition, for educational sufficiency, etc.); how often it assesses them; and whether it uses in-house staff, contractors, or a combination of the two to implement the assessments (or whether the LEA simply relies upon the condition assessments performed by the IAC and/or the IAC's contractors).
 - b) A description of the current status of the LEA's facility assessments, if any.

B) Facility Outcomes

The following elements are metrics that help to illuminate those key issues that can have an adverse impact upon life, safety, and/or health of facility occupants; upon teaching and learning; and/or upon the longevity of the facility. *For each of the following metrics, provide a figure for the Previous FY Goal (FY24), the Previous FY Actual (FY24), and the Current FY Goal (FY25).*

- 1) Facility Usability
 - a) For each active or holding PK-12 school facility, the number of facility-days during which the facility could not support the delivery of the educational programs and services assigned to that facility and that are normally delivered in that facility.
- 2) Maintenance (on an LEA-wide basis)
 - a) Work Orders (WOs)
 - i) Preventive Maintenance (PM)
 1. The total number of PM WOs opened.
 2. The percentage of PM WOs closed within 30 days.
 3. The total number of staff hours spent on PM work.
 4. The total number of contractor hours spent on PM work.
 5. The total dollars spent on PM work completed by staff.
 6. The total dollars spent on PM work completed by contractors.
 7. The percentage of all maintenance work hours spent on preventive maintenance.
 - ii) Corrective Maintenance (CM)
 1. The total number of CM WOs opened.
 2. The percentage of CM WOs closed within 30 days.
 3. The percentage of CM WOs marked as Emergency or High Priority WOs.
 4. The total number of staff hours spent on CM work.
 5. The total number of contractor hours spent on CM work.
 6. The total dollars spent on CM work completed by staff.
 7. The total dollars spent on CM work completed by contractors.
 8. The mean time to repair the items for which a CM WO was opened (in days elapsed).
 9. The percentage of CM WOs entered by central-administration or non-building-level staff.
 10. The percentage of CM WOs entered by building-level staff.
- 3) Custodial
 - a) The percentage of custodians trained on the LEA's Custodial Scope of Work during the last two fiscal years.
 - b) The percentage of custodial duties completed adequately (as assessed through the LEA's selected method of assessment and against the LEA's selected standard).
 - c) Percentage of custodial tasks tracked via CMMS work orders.

C) Resources and Inputs

- 1) Maintenance Staffing and Organization
 - a) Organizational chart for the current fiscal year for the LEA’s maintenance and operations units including custodial. Include the name of the incumbent or current holder of each position where possible.
 - b) List of positions by type or unit, with definitions; number of each type of position; number filled vs. vacant as of June 30 of the previous fiscal year (the fiscal year just completed).
- 2) Portfolio: A list of all LEA maintained buildings and their total GSF.
- 3) Summary of Current Staffing Against Industry Standards

Metric	Industry Standard	FY 24 Budgeted	FY 24 Actual	FY 25 Budgeted
a) Maintenance Staffing ¹ (FTEs for Total GSF)	APPA Level 2 (Comprehensive Stewardship): ____ FTEs for _____ Total GSF*			
b) Maintenance Load (GSF per FTE)	APPA Level 2 (Comprehensive Stewardship): 67,456 GSF per FTE			
c) Percent of Maint. staff delivering bldg. services ²	N/A			
d) Custodial Staffing (FTEs for Total GSF) ³	APPA Level 2 (Ordinary Tidiness): ____ FTEs for _____ Total GSF*			
e) Custodial Load (GSF per FTE)	APPA Level 2 (Ordinary Tidiness): 16,700 GSF per FTE			

* Enter the total GSF for the LEA’s active, holding and administrative facilities, divide by the appropriate GSF standard from the row below, and enter the resulting number of FTEs in the previous blank.

To the extent that these data are available at the regional/cluster/grade-band/school-type levels, place similar figures into an Appendix.

- 4) Funding, Budgets, and Spending
 - a. Budget Narrative: A brief description of the budget situation and context for the fiscal year.
 - b. Identify and list all categories the LEA is responsible for maintaining with the current O&M budget. (Example: IT, Security, Fleet, Grounds Equipment)
 - c. Provide the CRV using the current construction cost with site development: \$481 per square foot.
 - d. Fiscal Summary (see table on next page)

¹ Maintenance staffing includes all personnel for whom, on average, 75% or more of their time is devoted to implementing or managing the LEA’s maintenance activities, including those performed on grounds.

² This is the percentage of “boots-on-the-ground” maintenance staffers who actually perform services on PK-12 school facilities as opposed to performing administrative/managerial functions.

³ Custodial staffing includes all personnel for whom, on average, 75% or more of their time is devoted to implementing or managing the LEA’s custodial activities, including those performed on grounds

Enter a dollar figure for each box.

	Industry Standard	FY 24 Goal/Budget	FY 24 Goal/Budget per GSF	FY 24 Actual	FY 24 Actual per GSF	FY 25 Goal/Budget	FY 25 Goal/Budget per GSF
Spending							
Preventive Maintenance	N/A						
Corrective Maintenance	N/A						
Deferred Maintenance (if applicable)	N/A						
All Maintenance	(CRV x .03)						
All Maintenance, per GSF	N/A						
Operations	(CRV x .01)						
Operations, per GSF	N/A						
M&O Combined	(CRV x .04)						
M&O Combined, per GSF	N/A						

D) Planned Actions

- 1) Changes: Description of how the LEA's planned approach to maintenance or maintenance activities are different from the past year, if applicable.
- 2) List of Planned Improvements to Maintenance Structures/Systems and Maintenance Processes (Examples: Facilities, Staffing, CMMS, Organization).
- 3) List of Planned Major (Capital) Maintenance and Repair Projects by Facility for Current FY and next FY. Make sure to cover all categories listed as Major Building Systems in the IAC's Statewide Facilities Assessment (SFA): Structural; Skin; Roofs; Interior Construction; Interior Doors & Hardware; Ceilings; Wall Finishes; Flooring; Conveyances; Plumbing Fixtures; HVAC; Electrical Distribution; Life/Safety Systems; Relocatables; Program Support Equipment; and Site.
- 4) Professional Development (PD)
 - a) Describe the LEA's accomplishments
 - b) Describe the challenges that the LEA expects to face in the fiscal year at hand specific to maintenance in relation to skill sets and qualifications.
 - c) Briefly describe the key components of the LEA's PD plan for the year at hand and attach a copy.

E) Obstacles and Missing Resources

- 1) Describe any missing resources and obstacles to implementing needed maintenance activities.
- 2) Provide summaries of any relevant data sets included with the CMP.

Appendices

Optional: Summaries of Budgets/Goals and Actuals at the regional/cluster/grade-band/school-type levels against industry standards (as described in C.4.d above).

Procedures prepared by:

Interagency Commission on School Construction

351 West Camden Street, Suite 701

Baltimore, MD 21201

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