

# Protecting Our Parishes, Missions, and Schools

## Facility Assessment Plan & Preventive Maintenance Program

A Facility Assessment Plan and Preventive Maintenance Program are recommended for Church, School and Housing locations to define building and facility status, maintenance requirements and related expenses for budget planning purposes. The Plan includes the following steps:

**1. INSPECTION:** An initial inspection of the property and the grounds will help to assess the current state of the facilities and building plumbing, electrical and mechanical elements. Cost-effective repair measures can then be accurately determined.

The Assessment Plan initially requires a listing of buildings and grounds system components. These are defined by a detailed inspection followed by an organized facilities component list. Building and grounds component examples include parking lot and exterior lighting, landscaping, heating and air conditioning (HVAC), roofing, plumbing and electrical, fire protection systems and security system.

**2.** Determine building and grounds component status and future needs, including specific Preventive Maintenance (PM) requirements. This evaluation will require the use of qualified contractors in technical areas, to supplement in-house expertise.

**3. REPAIR PLAN:** A repair schedule should be created from the most important tasks to the least important, such as rewiring electrical systems, overhauling the sprinkler system, lawn care, plumbing, etc. Maintenance plans should be specific to the site and adapted to local circumstances, work methods and utilization of space.

**4. PREVENTIVE MAINTENANCE PLAN:** Provide a detailed resource for maintenance procedures, including monthly maintenance schedule, scope of work for outsourced bids, and cost estimate for recommended maintenance. Implement a schedule of Preventive Maintenance that will ensure building and grounds function and operate smoothly.

**5.** Determine future cost estimates for building and grounds components. Budgeting for unexpected emergencies should also be included.

**6.** This information should then be submitted to the Pastor/Principal/Director for approval, followed by the Parish/School/Housing Finance Committee for budget implementation. The Assessment Plan and PM Schedule can be easily documented on a spreadsheet to organize the effort.

**7.** A FACILITY & MAINTENANCE ASSESSMENT CHECKLIST example is shown here for your consideration.

### Facility Assessment Overview

- Facility, building and component inventory.
- Existing physical condition of each facility, building and component.
- Define facility and building use.
- Probable cost to remedy physical deficiencies.
- What investments need to be made, initially and long-term?
- Prioritize costs and investments.
- Define a reasonable budgetary funding process.

### Assessment Survey

- Structural and foundation condition survey
- Parking
- Roof
- Exterior walls
- Plumbing systems
- Electrical systems
- Mechanical systems
- Infrared thermal imaging

### Assessment Report

- Photograph and written documentation.
- Assessment of the property's interior and exterior conditions, systems and components.
- Detailed inventory of facility and building component quality, expected useful life, remaining useful life, and current replacement cost.
- Suggested remedies for physical deficiencies.



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