



THE STATE
of **ALASKA**
GOVERNOR MIKE DUNLEAVY

**Department of Education
& Early Development**

FINANCE & SUPPORT SERVICES

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Jackie Hanson, Superintendent
Craig City School District
PO Box 800
Craig, AK 99921

Re: Preventive Maintenance Site Visit

Dear Superintendent Hanson,

The State of Alaska requires that school districts must comply with the Preventive Maintenance (PM) Statute in order to receive funding under AS 14.11¹. Regulation also requires that the department perform an on-site inspection at least once every five years². Our records indicate that the department's last visit to your school district was on November 11th, 2021, the department is now in the process of scheduling an on-site visit for fiscal year 2027.

The site visit will include an office portion, and a field portion. During the office portion, the reports listed in the enclosed school district checklist³ will be reviewed; during the field portion, a progressive analysis, verifications, and discussions will be evaluated on how well the following topics corroborate with the department's statutes and regulations:

- maintenance program;
- energy management plan;
- custodial plan;
- maintenance training program;
- renewal and replacement schedules;
- six-year capital improvement plan that includes a description of the district's fixed asset inventory system.

Full-access to each school will be necessary. Pictures will be taken to document the school district's PM efforts. In order to ensure a successful site visit, the department will need to meet with the school district official(s) directly responsible for the implementation of the PM program.

¹ AS 14.11.011(b)(4);

² 4 AAC 31.013(f);

³ school district checklist;

This person may be you, the district's facility manager, the head of maintenance, and/or the head of the custodial services program. Be prepared to discuss maintenance and custodial issues and procedures. Furthermore, it will be helpful to hear how the school district determines, schedules, completes, and processes preventive and corrective maintenance work orders at the school level.

For your convenience, enclosed are copies of the relevant statutes¹ and regulations² as well as a school district checklist³ that the school district can use to prepare for the department's site visit. The department will contact you shortly to confirm the on-site review schedule, and to identify and establish communication.

Please let me know if you have any immediate questions. Thank you.

Best regards,

Jeremy McCarthy
Building Management Specialist

Attachments:

¹ AS 14.11.011(b)(4);

² 4 AAC 31.013(f);

³ school district checklist.

STATUTES

Sec. 14.11.011. Grant Applications.

(b)(1) a six-year capital improvement plan that includes a description of the district's fixed asset inventory system...

(b)(4) evidence acceptable to the department that the district

(A) has a preventive maintenance plan that

(i) includes a computerized maintenance management program, cardex system, or other formal systematic means of tracking the timing and costs associated with planned and completed maintenance activities, including scheduled preventive maintenance;

(ii) addresses energy management for buildings owned or operated by the district;

(iii) includes a regular custodial care program for buildings owned or operated by the district;

(iv) includes preventive maintenance training for facility managers and maintenance employees;

(v) includes renewal and replacement schedules for electrical, mechanical, structural, and other components of facilities owned or operated by the district; and

(B) is adequately adhering to the preventive maintenance plan.

REGULATIONS

4 AAC 31.013. Preventive maintenance and facility management

(a) For a district to be eligible for state aid under AS 14.11.011, the district must have a facility management program that addresses the following five elements of facility and maintenance management:

(1) a formal maintenance management program that records maintenance activities on a work order basis, and tracks the timing and cost, including labor and materials, of maintenance activities in sufficient detail to produce reports of planned and completed work;

(2) an energy management plan that includes recording energy consumption for all utilities on a monthly basis for each building; for facilities constructed before 12/15/2004, a district may record energy consumption for utilities on a monthly basis when multiple buildings are served by one utility plant;

(3) a custodial program that includes a schedule of custodial activities for each building based on type of work and scope of effort;

(4) a maintenance training program that specifies training for custodial and maintenance staff and records training received by each person; and

(5) a renewal and replacement schedule that, for each school facility of permanent construction over 1,000 gross square feet, identifies the construction cost of major building systems, including electrical, mechanical, structural and other components; evaluates and establishes the life-expectancy of those systems; compares life-expectancy to the age and condition of the systems; and uses the data to forecast a renewal and replacement year and cost for each system.

(b) Repealed 12/15/2004.

(c) At the request of a chief school administrator, the department will assist a district in implementing a qualifying preventive maintenance program through consultation, on-site reviews, and training.

(d) Repealed 12/15/2004.

(e) On an annual basis, the department shall provide a preliminary notice to each district regarding its compliance with each element required in (a) of this section, based on evidence of a program that was previously provided to the department, or that was gathered by the department during an on-site visit conducted under (f) of this section. On or before June 1, the department will provide its preliminary notice. The department may change a determination of non-compliance at any time during the year based on new evidence. Districts that are not in full compliance must provide evidence of compliance to the department by August 1. On or before August 15, the department will notify districts of its final determination regarding compliance. The department will deny a grant application submitted under AS 14.11.011 by a district that has received a final determination from the department that the district is out of compliance with this section.

(f) The department shall conduct on-site inspections of school district preventive maintenance and facility management programs at least once every five years. The department may make additional inspections as it deems necessary. The department may change its determination of compliance based on information obtained during the on-site inspections.

(g) In this section

(1) "district" has the meaning given in AS 14.11.135;

(2) "maintenance activities" means all work performed by district staff or contractors on building systems, components, utilities, and site improvements.

4 AAC 31.013. PREVENTIVE MAINTENANCE AND FACILITY MANAGEMENT COMPLIANCE

School District Checklist

- (a) For a district to be eligible for state aid under AS 14.11.011, the district must have a facility management program that addresses the following five elements of facility and maintenance management:

(1) a formal maintenance management program that records maintenance activities on a work order basis, and tracks the timing and cost, including labor and materials, of maintenance activities in sufficient detail to produce reports of planned and completed work;

Compliance with the above requirement is demonstrated by providing the following documentation:

<i>Maintenance Management</i>	
A1	Provide copies of work orders of varying types and status. ☐
A2	Report: Total maintenance labor hours collected on work orders by type of work (scheduled, corrective, operations support, etc.) vs. labor hours available—by month for previous 12 months. ☐
A3	Report: Scheduled and completed work orders—by month for previous 12 months. ☐
A4	Report: Number of incomplete work orders sorted by age (30, 60, 90 days, etc.) and status (deferred, awaiting materials, scheduled, etc.)—by month for the previous 12 months. ☐
A5	Report: Comparison of scheduled maintenance work order hours to unscheduled maintenance work order hours—by month for previous 12 months. ☐
A6	Report: Monthly trend data for unscheduled work orders showing both hours and numbers of work orders—by month for the previous 12 months. ☐
A7	Report: Planned maintenance activity report—by facility for next 3 months. ☐
A8	Report: Completed maintenance activity (work orders) including labor and material costs—by facility for previous 3 months. ☐

The district should be prepared to discuss the maintenance management procedures including a discussion of the district's preventive and corrective maintenance processes.

(2) an energy management plan that includes recording energy consumption for all utilities on a monthly basis for each building; for facilities constructed before 12/15/2004, a district may record energy consumption for utilities on a monthly basis when multiple buildings are served by one utility plant;

Compliance with the above requirement is demonstrated by providing the following documentation:

<i>Energy Management</i>		
B1	Provide a written energy management plan.	☐
B2	Reports: Consumption data for each building, each utility [e.g., fuel oil, electricity, natural gas, LPG, water, etc.]—by month for the previous 12 months.	☐
B3	Reports: Completion of Retro-Commissioning Need and Effectiveness Worksheet for qualified buildings, [e.g. fuel oil, electricity, natural gas, Recovered Heat, LPG, etc.]—by month for the previous 12 months.	☐

The district should be prepared to discuss its energy management plan and the results gained from the plan.

(3) a custodial program that includes a schedule of custodial activities for each building based on type of work and scope of effort;

Compliance with the above requirement is demonstrated by providing the following documentation:

<i>Custodial Program</i>		
C1	Provide a written custodial plan that is building-specific and describes both the frequency (schedule) and level of custodial care for each facility.	☐

The district should be prepared to discuss the custodial plan, identify building specific references, and show how the plan relates to a building's physical inventory (i.e. types of surfaces to be cleaned)

(4) a maintenance training program that specifies training for custodial and maintenance staff and records training received by each person; and

Compliance with the above requirement is demonstrated by providing the following documentation:

Maintenance Training

Provide a schedule of planned training for both ☐
custodial and maintenance personnel—for the current
or upcoming school year.

Provide a record of training describing type and ☐
duration of training—by individual for current school
year.

The district should be prepared to discuss training opportunities available to maintenance staff including system specific training relevant to a district's building systems and equipment.

(5) a renewal and replacement schedule that, for each school facility of permanent construction over 1,000 gross square feet, identifies the construction cost of major building systems, including electrical, mechanical, structural and other components; evaluates and establishes the life-expectancy of those systems; compares life-expectancy to the age and condition of the systems; and uses the data to forecast a renewal and replacement year and cost for each system.

Compliance with the above requirement is demonstrated by providing the following documentation:

Renewal and Replacement (R&R) Schedules

E1 Provide a Renewal/Replacement Schedule ☐
(detailed to at least EED's 26 systems) for each
permanent building over 1000sf.

E2 Provide information that supports that the data in ☐
the R&R schedules was developed based on
system condition assessments.

The district should be prepared to discuss the capital planning process (how are capital projects selected and prioritized), and how the district uses the renewal and replacement schedules in developing the capital project priorities for the district.

AS 14.11.011(b)(1) a six-year capital improvement plan that includes a description of the district's fixed asset inventory system...

Compliance with the above requirement is demonstrated by providing the following documentation:

Fixed Asset Inventory System (FAIS)

F1 Report: Report of fixed asset, date acquired, ☐
location and estimated period of service.

The district should be prepared to discuss how purchased equipment is added to the fixed asset inventory system.