

Planning for Maintaining School Facilities? Help is on the Way

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Pay me now or pay me later—anyone who has bothered to replace a roof on an old home or change the oil in their car knows the saying. Perhaps school facility managers and business officials know the truth of the message even better than most. But because facilities maintenance planning is constrained by real world budgets, planners must often think in terms of tradeoffs—weighing routine day-to-day tasks against preventative maintenance that pays off only over the long run. However, to borrow another phrase, the future is now. As America's school buildings age, decades worth of deferred maintenance is coming due. Many facilities are now desperately in need of major overhauls. At the same time, the ongoing expenses of routine and preventative maintenance must still be covered or else the cycle of neglect and deferred maintenance will continue.

School facility maintenance is an integral, yet often overlooked, aspect of the delivery of instructional services to students. Large capital investment can be squandered when buildings and equipment deteriorate or warranties become invalidated. Moreover, failure to adequately maintain school facilities discourages future public investment in the education system. But maintaining school facilities involves more than just providing a safe, clean, and healthy environment. It is also about creating an atmosphere that is appropriate for instruction. A classroom with broken windows doesn't foster effective student learning, but neither does an apparently state-of-the-art classroom that is plagued with poor indoor air quality—which can adversely affect the alertness, health, and attendance of both students and teachers alike.

To address this issue of growing public interest, the National Center for Education Statistics (NCES) of the U.S. Department of Education is supporting a cooperative effort between the Association of School Business Officials (ASBO) International and the National Forum on Education Statistics (the Forum) to develop “best practice” guidelines for effectively planning the maintenance of school facilities. In January 2001, a joint task force of ASBO and Forum members was authorized to begin work on a *Guide to Facilities Maintenance Planning*. The *Guide* will be designed for use by staff at the local school district level, where most facility maintenance is planned, managed, and carried out. This audience includes school business officials, school board members, superintendents, principals, facilities maintenance planners, maintenance staff, and custodial staff. Secondary audiences include state education agency staff, community groups, vendors, and regulatory agencies (e.g., the EPA).

Roger Young, a school business official with the Haverhill (Massachusetts) Public Schools, chairs the School Facility Maintenance Planning Task Force. Mr. Young is a member of both ASBO and the National Forum on Education Statistics. Other participants include ASBO members John Bowers (Grand Valley State University, Michigan), Joan Hubbard (an independent school facilities consultant), Frank Norwood (Katy School District, Texas), and Tim Shrom (Southern Lancaster County Schools, Pennsylvania). Participating members of the National Forum on Education Statistics include Janet Emerick (Lake Central Schools, Indiana), Patty Murphy (Utah State Office of Education), and David Uhlig (Charlottesville City Public Schools, Virginia). Other participants who have agreed to share their expertise include Ed Brzezowski (an independent school facilities consultant), Lee Hoffman (National Center for Education Statistics), Mary Filardo (21st Century School Fund), Christine Lynch (Massachusetts Department of Education), Judy Marks (National Clearinghouse for Education Facilities), Jay Sullivan (Massachusetts Department of Education), and Tom Szuba (an independent education research consultant).

Because no two organizations face the same challenges, the *Guide* will focus not on a single template for a facilities maintenance planning, but rather on “best practice” processes an education organization can undertake to construct a sound facility maintenance plan that meets its unique needs and circumstances. The document is expected to offer recommendations on issues of vital importance such as: Why Does Facilities Maintenance Matter; Where to Begin (Knowing What You Have Through Inventories and Audits); Identifying Stakeholder Needs; Ensuring Environmental Safety; Maintaining School Buildings; Maintaining School Grounds; Effectively Managing Staff and Contractors; and Evaluating Facilities Maintenance Practices. A primary focus of the document will be the user-friendly presentation of the guidelines. Thus, the document will include sample checklists, questionnaires, and brochures collected from facility maintenance professionals throughout the country, as well as links to additional resources that support school facility maintenance initiatives. It will also rely upon vignettes and case studies to help ensure that connections between “best practice” and the real world are evident.

Although the School Facility Maintenance Planning Task Force is composed of members with a wealth of school facilities and management experience, the group believes that additional input from the education practitioners is vital to the success of the project. “It is difficult to know precisely what facilities managers need unless you ask them,” said Chair Roger Young, “so we are going to hit the pavement and ask people what they think belongs in this type of document.” Young expects that task force members will offer presentations at several national conferences (including the ASBO National Conference and the NCES Summer Data Conference) with hopes of sharing drafts with potential users and soliciting feedback on their efforts.

It is anticipated that the *Guide to Facilities Maintenance Planning* will be completed over the course of the next two years. It will ultimately be available both in paper form and via the World Wide Web. Project updates and information about National Forum on Education Statistics are available at <http://nces.ed.gov/forum>.