
Introduction

Preserving building systems is important because public buildings represent significant investments of tax dollars.

This report examines best practices in managing preventive maintenance for buildings owned by Minnesota local governments. Preventive maintenance is regularly scheduled inspection, testing, and repair of building components intended to prolong a building's life and restore components' efficiency. Because of the great investment taxpayers have made in public buildings throughout the state, the question of how best to maintain them is an important one.

The report focuses on building maintenance activities of counties, cities, and school districts. We examined how extensively these jurisdictions practiced preventive maintenance and asked about obstacles limiting local governments' ability to perform preventive maintenance.

At the start of the project, we held a roundtable discussion to learn what local building managers, finance officers, and legislators viewed as important issues. The study included a review of literature on building maintenance published by a variety of groups, from the Association of School Business Officials International to the U.S. Army Corps of Engineers. We visited several local governments in different regions of the state to interview building maintenance managers and local finance officers on how they funded and performed preventive maintenance. In addition, representatives of various private sector firms involved with building maintenance spoke with us about their services.

Standards and guidelines published by organizations such as the Building Owners and Managers Association, the American Public Works Association, and the American Management Association, and information from recognized experts in facilities management such as Harvey H. Kaiser and Thomas A. Westerkamp, helped us define the best practices needed for successful preventive maintenance. Based on the work of these and many other authors, we identified measures of performance. The measures provided a framework for determining the extent of local government involvement in effective preventive maintenance programs.

As a way to learn more about preventive maintenance in Minnesota, we surveyed school districts, counties, large cities, and a sample of smaller cities. Survey results gave us a picture of which local governments reported using preventive maintenance consistently. They also allowed us to identify jurisdictions that appeared to be using preventive maintenance effectively and efficiently based on whether they met performance standards developed earlier in the study. We visited a small number of these jurisdictions. During these visits, local officials offered additional information on particular maintenance practices.

Throughout the review we relied on the advice and expertise of a technical advisory panel established at the outset of the project. The 11-member panel consisted of facility directors and finance officers representing counties, cities, and school districts; employees of companies involved with building maintenance

issues; and a representative from the Department of Children, Families, and Learning. Members offered their professional input at various stages of our work. Appendix A lists the technical panel members and provides additional details on the methodology of the review.

This report has three chapters. In the first, we provide background information defining preventive maintenance and its value. Chapter 2 recommends best practices that local governments should take to achieve the goals of preventive maintenance. Based on survey data we collected, it describes the number of local governments that follow various best practices for preventive maintenance. The chapter also presents examples of Minnesota school districts, cities, and counties that use best practices in preventive maintenance for their buildings. Chapter 3 explains differences in local governments' use and management of preventive maintenance. It describes obstacles local governments believe limit their ability to perform preventive maintenance. The chapter also explains how local governments fund preventive maintenance and briefly describes the state's role in local building maintenance.