



Deferred Maintenance, Master Plan & Facility Condition Indexing

(Incorporating Your Deferred Maintenance with Your Master Plan via Facility Condition Indexing)

After reading this month's facility management column, it is only fitting to follow up the discussion of when to replace a piece of equipment or building material e.g., roof. As the facility manager maintains the building's database, this information can be integrated into the building's master plan as the equipment and materials age via a deferred maintenance plan. Refer to *Focus on Facilities* June 2019, "[Facility Assessment = Your Building Condition Index](#)".

Once an asset e.g., primary hot water heating pump, slowly but progressively wears from usage and begins to leave its 0.29 FCI status of "managed care" and transitions to a 0.30 to 0.49 FCI status, then it is time for the facility manager and the asset manager to begin to discuss assigning a place for it in the "deferred maintenance" category. This new category will then need to be considered for coordination/assignment in the building's master plan.

As discussed in our October 2019 *Focus on Facilities* Asset Management column, "[The Four Types of Maintenance](#)" deferred maintenance doesn't mean no maintenance, but it is simply assigning the designated equipment or material an additional status by drawing from the inventory within the facility's deferred maintenance plan. This plan slowly grows in existing asset data aging with more equipment and materials added along with "best-guess" estimates of when specific assets will possibly fail and require replacement. Equipment such as an end-suction hot water heating pump, that operates six months of the year, may have an estimated useful service life of sixteen years. If not



properly maintained this pump may fail sooner than expected resulting in premature repair or replacement costs and, more often than not, at a premium cost to the building Owner.

In our November 2020, "[Creating a Deferred Maintenance Plan](#)" *Focus on Facilities* column we discussed deferred maintenance along with proactive planned maintenance, and so this pump could possibly continue to operate efficiently for more than the budgeted sixteen years but at some point, the pump will become antiquated and in need of deferred maintenance e.g., replacement of the pump. The facility manager's best guess within a deferred maintenance plan may include an estimated replacement cost of \$2,500.00 to replace this old pump at year sixteen.

Recognizing the building management group has

their deferred maintenance plan and have also created a building master plan it is important that the master plan recognize there are facility management budgeted replacement costs that can have an important influence on any master planning initiative being done in the building. For example, to plan on upgrading floors in the building in five years due to anticipated space usage alterations it would be unfortunate to renovate floors without considering the aging heating system serving these floors. Facility management and asset management should go together, and communication should be on-going so that each management group understands the other group's goals, expectations, annual budget, and long-term budget.

There is a saying, "Timing is everything" and certainly this applies to the building's overall master plan to not overlook the facility's deferred maintenance plan, and to very possibly interact with this second plan. Planning ahead is always a worthwhile effort where replacement costs can be integrated with certain capital projects that will come out of the master plan. Analogous to someone buying a new automobile but negotiating with the car dealer to put used tires on the vehicle to save first-cost would never happen so why would a building owner's master plan team ignore the existing conditions of the facility's equipment, roof, windows, etc. To go back after the project is closed out and replace building infrastructure or existing equipment that just failed, requiring new equipment to be purchased due to unscheduled system failure affects the overall building operating budget.

Therefore, it is just "good business" to take into account existing conditions and the status of these conditions when some of the materials and/or equipment are nearing the end of useful service life. The link to blending the deferred maintenance list and the master plan list will most likely be the building's FCI indicators associated with that which has been deferred up until this point. Will the next capital project include or overlook equipment and

materials that are in the reactive management or crisis management categories?

Additional *Focus on Facilities* columns to cross reference with this column that are integral with this month's topic please go to:

Asset Management:

[February 2019, A Capital Project Roadmap](#)

[October 2019, The Four Types of Maintenance](#)

[November 2020, Creating a Deferred Maintenance Plan](#)

[February 2021, Master Planning](#)

[May 2020, Organize Those Record Drawings](#)

Facility Management:

[September 2020, Planning an Infrared Building Exterior Survey](#)

[August 2021, Creating Your Own Database—Part 1](#)

[September 2021, Creating Your Own Database—Part 2](#)

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