

Housing & Facilities Conference

Presented by the FMC

Scan the QR code or visit the appendix of your workbook to access downloadable materials for this session.



Partners In Preventative Maintenance

Amanda Rodriguez

**Housing
& Facilities
Conference**
Presented by the FMC

Introductions

- Amanda Rodriguez
 - *She/her*
 - FMC Manager
 - In my professional travels I have been on over 100 campuses.
- Email:
arodriguez@gammaphibeta.org



Case Study



Discuss with a partner: What went wrong?

Learning Objectives

- Define preventative maintenance.
- Explore preventative maintenance strategies.
- Draft a preventative maintenance plan to complete after the HFC.

Note: None of the HFC sessions should be construed as legal advice. You will need to determine if anything you want to implement following this conference will need to be approved by your board, affiliated house corporation (AHC) membership and local campus. You may need to consult your AHC's legal counsel.



Housing & Facilities Conference

Presented by the FMC

What is “Preventative Maintenance?”

Quiz

- **True or False:** Replacing a broken lamp that fell from a side table in a common space is an example of preventative maintenance.
 - Answer: False

What is “Preventative Maintenance?”

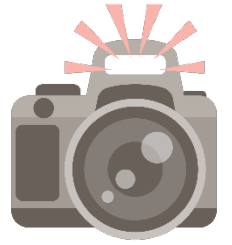
- **Definition:** Preventative maintenance is the practice of regularly servicing and inspecting equipment to prevent breakdowns. Preventative maintenance can help equipment last longer, reduce downtime and save money.

Tip: Record notes on Page 29.

Activity

- What are some items you think could be considered preventative maintenance?
 - With a partner: Record preventative maintenance ideas in your workbook.

Definition: Preventative maintenance is the practice of regularly servicing and inspecting equipment to prevent breakdowns. Preventative maintenance can help equipment last longer, reduce downtime and save money.



Tip: Take a photo of this slide.

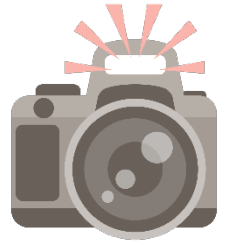
Preventative Maintenance Examples

Air conditioning service	Appliance service	Backflow cleaning/inspection	Carpet cleaning	Caulking	Chandelier cleaning	Deep cleaning
Drain cleaning	Dryer vent cleaning	Electrical systems	Elevator inspection/maintenance	Exit light check	Fire alarm testing/inspection	Fire extinguisher inspection
Fire sprinkler inspection	Floor cleaning	Furnace	Gas inspection	Grease trap cleaning	Gutter cleaning	Health inspection
Heat service and regulation	Hood cleaning/inspection	Landscaping	Lawn maintenance	Lawn fertilization	Pest control	Paino tuning
Roof cleaning	Security light check	Security/alarm service	Snow/ice removal	Sprinkler system maintenance	Termite inspection/service	Trash service
Tree/hedge trim and inspection	Upholstery cleaning	Vacuum service	Water heater	Water softener	Window screen cleaning	

Note: This is not an all-inclusive list. Requirements vary by location. You will need to determine if anything you want to implement following this conference will need to be approved by your board, AHC membership and local campus. You may need to consult your AHC's legal counsel.

Activity

- **Scenario:** The Phi Mu Chi chapter house at Smarts College, built in the 1950s, has served as a home for generations of members. While the AHC has maintained the property over the years, several features are nearing the end of their lifespan. The TV room's wood floor is starting to sag, and the AHC has budgeted to replace the windows during this fiscal year to address their age and rising utility costs. The HVAC system is experiencing more frequent breakdowns, and a recent vendor inspection revealed corrosion on the aging gas lines.
- **Discuss with a partner:**
 - What preventative maintenance items do you identify?
 - If you were on this AHC, what questions would you ask to help you begin thinking about a preventative maintenance plan?



Tip: Take a photo of this slide.

Preventative Maintenance Key Questions

- What data does your AHC have about when projects were last completed?
- When was the last time your AHC had an expert assess your property to determine maintenance needs?
- What problems does your AHC know of right now?
- What are the biggest complaints your AHC receives from members?
- Does your AHC have a long-term funding plan?
- Does your AHC have repeat projects that could be addressed differently?

Types Of Preventative Maintenance

- Life and safety
- Large equipment
- Structural



Tip: Record notes on Page 29.

Housing & Facilities Conference

Presented by the FMC

Prioritizing Preventative Maintenance

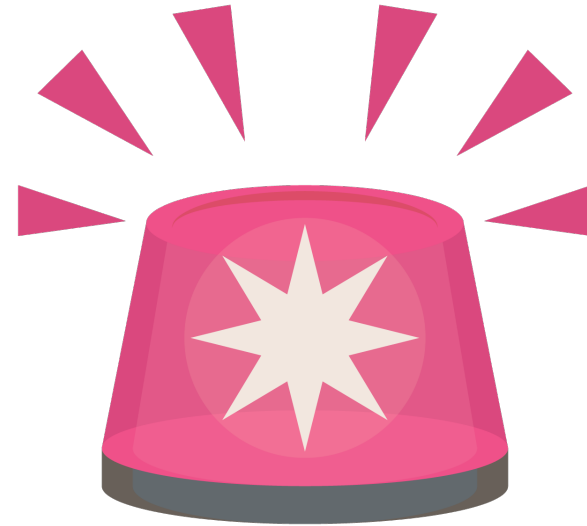
Life And Safety Maintenance Priorities

- The safety of your members and residents is one of your top priorities.
- Any maintenance issue could turn into a life and safety issue.
- Life and safety maintenance key questions
 - What can be done to eliminate the safety concern?
 - Is your property safe and secure?
 - Are the members in your property safe and secure?

Tip: Record notes on Page 30.

Life And Safety Maintenance Examples

- Examples include but are not limited to:
 - Fire/safety equipment
 - Access control systems
 - Exterior lighting
 - Alarm systems
 - Access points



Large Equipment Maintenance Priorities

- Honoring your investment:
 - How can routine service help maintain/extend the life of the equipment?
- Large equipment key questions:
 - How does the lack of this equipment affect the use of the property?
 - Could other issues arise without this equipment?
 - Is there an alternative if this equipment is out of order?
 - Does the maintenance issue create life or safety concern?

Tip: Record notes on Page 30.

Large Equipment Maintenance Examples

- Examples include but are not limited to:
 - HVAC
 - Furnace
 - Boiler
 - Water heater



Structural Maintenance Priorities

- Structural maintenance key questions
 - What is the bigger impact to the property?
 - Is the structural item something that can be taken offline?
 - Can continuous ongoing maintenance resolve the issue?
 - Does the maintenance issue create life or safety concern?

Tip: Record notes on Page 30.

Structural Maintenance Examples

- Examples include but are not limited to:
 - Roof
 - Plumbing
 - Gas lines
 - Paint
 - Foundation



Preventative Maintenance Partners: Working With Gamma Phi Beta Collegians

- Partner with experts
- Be transparent about costs and decision-making
- Help members understand the positive impact of the maintenance
- Give regular updates on work being done at the property
- Solicit feedback

Tip: Record notes on Page 31.

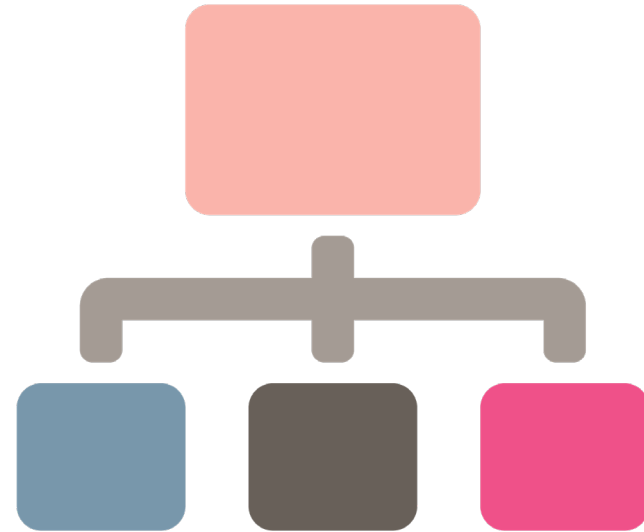
Housing & Facilities Conference

Presented by the FMC

Preventative Maintenance Planning

Planning Strategies

- Follow guidance from trusted vendors
- Bid out larger projects
- Phase out larger projects
- Create a long-term budget
- Look at all priorities and items needed
- Track life of items
- Consult with legal counsel

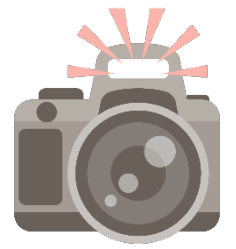


Create a Preventative Maintenance Plan

- Review your budget
 - Revenue versus projected expenses
- Differentiate between wants and needs
 - Wants:
 - Redecorating
 - Renovations
 - Full depreciated items
 - Needs:
 - State, local, equipment specific requirements
 - Routine service recommendations/requirements
 - Items frequently requiring repairs
 - Warranties



Sample/Partial Preventative Maintenance Plan



Tip: Take a photo of this slide.

Preventative Maintenance Schedule

MAINTENANCE ITEM	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25
Air conditioning service and regulation	07/23/2024 07/23/2024 (17-96) 07/05/2024 (17-94)	08/27/2024 (17-97)	09/30/2024 (17-98)	10/24/2024 (17-99)	11/26/2024 (17-100)	12/26/2024 (17-101)	01/25/2025 (17-X)
Backflow	07/19/2024						
Carpet Cleaning	07/02/2024						
Chandelier Cleaning	07/02/2024						
Dryer Vent Cleaning	07/04/2024 (140-11)						
Elevator Inspection						12/03/2024 (212-7)	
Lawn Maintenance	07/31/2024 (45-106) 07/24/2024 (818-1)	08/31/2024 (45-107)	09/30/2024 (45-109)	10/13/2024 (818-2) 10/31/2024 (45-110)			
Piano Tuning	07/31/2024						
Smoke Detector Check	07/19/2024	08/30/2024	09/30/2024	10/31/2024	11/30/2024	12/27/2024	01/31/2025
Tree Trimming				10/19/2024 (203-10)			
Vacuum Service						12/17/2024 (36-11)	
Water Heater	07/08/2024 (670-3)						

Legend:

- Past Due
- Scheduled
- Complete
- (Invoice)

Emergency Maintenance

- **True or false:** You can create a robust preventative maintenance plan and equipment can still break.
 - Answer: True.

Housing & Facilities Conference

Presented by the FMC

Planning Activity

Activity

- Instructions:
 - Turn to Page 32 in your workbook.
 - Select two preventative maintenance key questions and answer them in your workbook.
- Preventative maintenance key questions
 - What data does your AHC have about when projects were last completed?
 - When was the last time your AHC had an expert assess your property to determine maintenance needs?
 - What problems does your AHC know of right now?
 - What are the biggest complaints your AHC receives from members?
 - Does your AHC have a long-term funding plan?
 - Does your AHC have repeat projects that could be addressed differently?

Housing & Facilities Conference

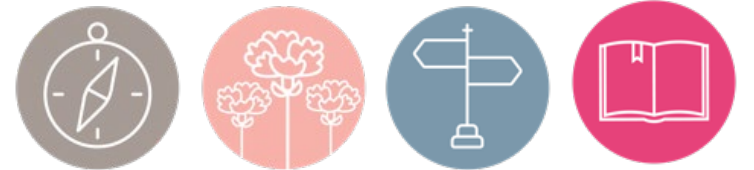
Presented by the FMC

Your Session Learning

Learning Recap

- Define preventative maintenance.
- Explore preventative maintenance strategies.
- Draft a preventative maintenance plan to complete after HFC.

Tip: Don't forget to write down your key learning takeaway in your workbook.

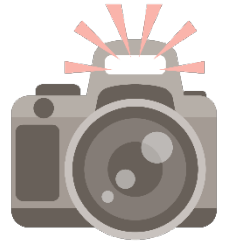


Learning Assessment

Partners in Preventative Maintenance

[GammaPhiBeta.org/Housing-
And-Facilities-
Conference/Resources](https://GammaPhiBeta.org/Housing-And-Facilities-Conference/Resources)





Tip: Take a photo
of this slide.

Amanda Rodriguez

FMC Manager

Email: arodriguez@gammaphibeta.org

Housing & Facilities Conference

Presented by the FMC