



Catalina Foothills School District

Preventative Maintenance Plan

2026-2027

District Name: **Catalina Foothills Unified District**

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Components of a Preventive Maintenance Plan: These are components of a Preventive Maintenance Guideline and Plan the district will provide written explanations and descriptions for each in the following survey:

1. Prioritize Tasks
2. Preventive Maintenance Schedule
3. Optimize Work Hours
4. Utilize Technology
5. Staff Education, Training and Empowerment
6. Continuity of Operations
7. Continuous Improvement
8. Celebrate Success

1. **Prioritize Tasks:** Describe the district's methodology of prioritizing preventive maintenance tasks (safety, emergency, routine maintenance, reactive, etc.)

The Catalina Foothills School District utilizes a computerized, automated work order management system, Brightly Asset Essentials, to schedule, assign, and track annual preventive maintenance work orders. The District has utilized computerized work order management software since approximately 2006, when it implemented SchoolDude as its maintenance management platform. To improve operational efficiency and provide a more intuitive experience for maintenance staff, the District transitioned to Asset Essentials in June 2026. Asset Essentials provides a more user-friendly interface,

enhanced asset management capabilities, and a mobile application that allows technicians to receive, update, document, and complete work orders directly from the field.

Since implementing Brightly Asset Essentials, the District has also begun a comprehensive review and update of all preventive maintenance categories, assets, schedules, and maintenance tasks. This effort is intended to standardize and improve preventive maintenance procedures across all campuses, improve consistency, align maintenance activities with current manufacturer recommendations and industry best practices, and better utilize the expanded capabilities of the new asset management system.

Task sheets have been developed and are being updated for each preventive maintenance category and applicable asset. Each task sheet provides a detailed list of individual items to be inspected, checked, and tested. These standardized task sheets provide maintenance staff with consistent procedures for completing preventive maintenance activities and help ensure that required inspections, testing, documentation, and corrective actions are completed. The District primarily follows a preventive maintenance program designed to maintain safe, reliable, and efficient facilities across its nine campuses while also incorporating a risk-based approach to address areas of greatest operational concern.

All major building systems, including HVAC, roofing, electrical, plumbing, building surfaces, special systems, and special equipment are maintained through comprehensive preventive maintenance schedules managed within Asset Essentials. The system ensures maintenance activities are scheduled and completed consistently, documented accurately, and tracked to support asset reliability, operational efficiency, regulatory compliance, and continuous improvement.

The District's risk-based approach prioritizes maintenance activities based on seasonal conditions and potential operational impacts. HVAC systems receive the highest priority during the spring and summer months to ensure reliable cooling performance during periods of extreme heat, maintain occupant comfort, and protect temperature-sensitive special systems and equipment.

Roofing systems become a primary focus before and during Arizona's monsoon season to identify and address potential deficiencies, prevent water intrusion, and minimize weather-related damage. This includes campus site inspections to verify that roof drains, drainage culverts, and stormwater pathways are free of debris and functioning properly.

During the winter months, the District also implements proactive freeze-event preparations. These activities include inspecting and protecting exposed plumbing

systems, irrigation components, backflow preventers, and other vulnerable infrastructure. Staff also monitor weather forecasts and implement freeze-protection measures as necessary to reduce the risk of damage and maintain uninterrupted facility operations.

Other critical building systems continue to receive scheduled preventive maintenance throughout the year based on manufacturer recommendations, seasonal operational needs, regulatory requirements, and the operational risk associated with each asset. This proactive, risk-based methodology allows the District to reduce emergency repairs, extend the service life of building assets, improve maintenance efficiency, identify deficiencies before they become major failures, and provide safe, reliable, and comfortable learning environments for students and staff.

2. **Preventive Maintenance Schedule:** Provide a detailed schedule including monthly, quarterly, semi-annual, and annual preventive maintenance tasks.

Task sheets have been developed and are being updated for each Preventive Maintenance category and for each of the items listed below. Each task sheet includes a detailed list of individual components and tasks that must be inspected, checked, and tested as part of the Preventive Maintenance process. The task sheets provide standardized procedures for maintenance staff to follow, helping ensure that each asset is consistently inspected and that required testing and documentation are completed. The following maintenance Schedules are performed quarterly and include the following main items, unless otherwise noted:

- **Roofing Items:** Roof drainage systems, roof flashings and roof jacks, flat roofing systems, general roof system inspection, roof penetrations (vents, curbs, equipment supports, etc.), tile, wood shake, and shingle roofing systems
- **HVAC Items:** Boilers, chillers, cooling towers, fan coil units and ventilation fan, heat pumps, heating systems, packaged refrigeration systems
- **Plumbing Items,** Water heaters, backflow preventors, disposal/lift stations, domestic water systems, fixtures/valves
- **Gas Systems Electrical Items:** Dimmer systems, emergency generators (tested every Monday morning throughout the year)
- **Lighting Systems:** switchgear/disconnects, switches/receptacles, transformers
- **Surfaces Items:** Block/brick/concrete, carpet, ceiling tile, ceramic tile, drywall/wall coverings, asphalt, VCT tile, wood surfaces
- **Special Systems Items:** Intrusion alarm systems, emergency lighting systems, energy management systems, fire alarm systems, intercom/PA systems, network systems, sprinkler systems, stage lighting systems

- **Special Equipment Items:** Bleacher seating, doors and windows, elevators (PM performed on a monthly basis), kilns/foundry equipment, kitchen equipment, lockers, stage rigging systems.
3. **Optimize Work Hours:** Describe the District’s methodology for optimizing employee work hours to accomplish preventive maintenance tasks.

The Catalina Foothills School District adjusts Facilities staffing schedules seasonally to maximize productivity, improve efficiency, and minimize disruption to campus operations. Facilities maintains two work shifts, with staffing adjusted based on seasonal needs.

During the summer months, Facilities staff work from 6:00 a.m. to 2:30 p.m., Monday through Friday, providing extended coverage during the period of highest HVAC demand. The earlier start time allows staff to complete critical HVAC preventive maintenance, inspections, repairs, and projects during the cooler morning hours and before peak cooling demand. During the winter months, Facilities staff work from 7:00 a.m. to 3:30 p.m., Monday through Friday. This schedule provides consistent coverage for preventive maintenance, work orders, and campus support while accommodating seasonal needs.

In addition to the seasonal shifts, the Facilities Department maintains one dedicated General Maintenance Technician on a year-round schedule from 7:30 a.m. to 4:00 p.m., Monday through Friday. This position provides consistent daily coverage throughout the year for general maintenance work orders, building repairs, preventive maintenance activities, and campus support.

Facilities technicians also perform preventive maintenance work orders daily while they are at any of the District campuses, in conjunction with their regular corrective and general maintenance work orders. Incorporating preventive maintenance activities into the technicians' daily campus assignments improves efficiency by allowing technicians to address multiple maintenance needs during the same campus visit. This approach reduces unnecessary travel between campuses, allows technicians to identify and address potential deficiencies earlier, and helps ensure preventive maintenance activities are completed consistently throughout the year.

With the implementation of the Asset Essentials mobile application, technicians are also encouraged to create and submit work orders when they observe maintenance issues or potential deficiencies while working at any District site. This follows a “see something, report it” approach, allowing technicians to document issues as they are identified rather than waiting for a work order to be submitted by campus staff. Technicians can use the

mobile application to quickly document the issue, provide relevant details and photographs, and submit the work order for tracking and assignment. This proactive approach improves communication, helps identify deficiencies at an earlier stage, and allows the Facilities Department to address issues before they develop into more significant maintenance problems.

This scheduling and work assignment approach provides the District with continuous Facilities coverage during occupied school hours throughout the year while allowing staffing levels and work hours to be adjusted to address seasonal demands and priority maintenance needs. It also supports a more efficient and proactive maintenance program by integrating preventive maintenance, routine work orders, and proactive issue reporting into the technicians' normal daily workflow.

4. **Utilize Technology:** Describe the District's planned use of technology and other tools to implement preventive maintenance.

The Catalina Foothills School District has utilized computerized work order management software since approximately 2006, when it implemented SchoolDude. To improve operational efficiency, enhance asset management, and provide a more intuitive experience for maintenance and District staff, the District transitioned to Brightly Asset Essentials during the summer of 2026.

Asset Essentials is used to schedule, assign, and track preventive maintenance work orders, manage workload distribution, and maintain comprehensive records for District assets. The system helps ensure that preventive maintenance activities are completed consistently, documented accurately, and tracked over time to support asset reliability, operational efficiency, and continuous improvement.

The Asset Essentials mobile application allows field technicians to receive work assignments, document labor and materials, upload photographs, update asset information, and complete work orders directly from their mobile devices while working in the field. The mobile application also allows technicians to create new work orders when they identify maintenance issues or deficiencies while working at District facilities.

In addition, staff and other work order requestors can submit service requests directly through Asset Essentials using their mobile devices. Requestors can provide descriptions of the issue and upload photographs, when appropriate, which helps maintenance staff better understand and evaluate the issue before responding. This improves communication and provides technicians with useful information before arriving at the location.

A new capability available through Asset Essentials is the use of QR codes attached to District assets. QR code labels will allow technicians to quickly identify specific equipment and access the corresponding asset record, including relevant maintenance information, work history and manufacturers manuals. Technicians will be able to use the QR code to quickly review equipment information, perform routine repairs and preventive maintenance, document completed work, and create new work orders directly from the asset record. The District plans to begin implementing QR codes on selected District assets later in 2026, with the goal of expanding their use across the District over time.

The District is also exploring opportunities to integrate artificial intelligence (AI) capabilities into its Asset Essentials platform as these technologies become available and appropriate for District use. Potential applications include improving maintenance data analysis, identifying trends and recurring equipment issues, automating routine processes, improving work order prioritization, and providing additional information to support proactive maintenance planning and decision-making.

5. **Staff Education, Training and Empowerment:** Describe the District's planned training to enhance employee skills to extend the useful life of building systems and development of building renewal planning and implementation.

The Catalina Foothills School District recognizes that a successful preventive maintenance program depends on knowledgeable, skilled, and empowered employees. The District supports ongoing professional development by providing technicians opportunities to attend HVAC, locksmith, and other industry-related training courses as they become available typically at least once annually.

Continued education ensures maintenance staff remain current with evolving equipment, technologies, and industry best practices. Through ongoing training and employee empowerment, the District strengthens its preventive maintenance program and improves service delivery across all nine campuses.

6. **Continuity of Operations:** Describe the District's plan for succession of preventive maintenance program and recordkeeping for future facilities employees and upload a Record Retention Schedule for as-builts, PM records, certifications, inspections and reports.

Asset Essentials retains historical work order and preventive maintenance records, providing the Facilities Department with a centralized record of completed maintenance activities, asset history, repairs, and other work performed on District facilities and

equipment. This information allows maintenance staff to review historical records when troubleshooting equipment, planning future maintenance, or evaluating the condition and service history of District assets.

In addition to the Asset Essentials system, the Facilities Department maintains electronic records of District construction documents, annual inspections, maintenance documentation, and other facility-related records on a shared Facilities Department Google Drive. Maintaining these records electronically provides centralized access to important facility documentation and helps ensure that records remain available to authorized Facilities staff when needed.

The Facilities Department also maintains hard copies of District site construction plans and other important facility documents. These physical records provide an additional source of information and serve as a backup to the District's electronic records. Maintaining both electronic and hard-copy records helps support continuity of operations and ensures that critical facility information remains accessible for ongoing maintenance, repairs, renovations, inspections, and future construction projects.

7. **Continuous Improvement:** Describe how the District plans to implement continuous improvement of its preventive maintenance program.

The Catalina Foothills School District is committed to continuously improving its preventive maintenance program through regular evaluation of maintenance practices, asset performance, and operational needs. Facilities administration staff routinely perform campus-wide, on-site inspections at each District campus on a monthly basis to identify unreported maintenance issues, building deficiencies, safety concerns, and other conditions that may require attention. These inspections provide an additional layer of oversight and allow the Facilities Department to identify and address potential problems before they develop into more significant repairs or disruptions to campus operations.

The District also utilizes data collected through its work order management system to identify trends, prioritize resources, improve scheduling, and proactively address potential equipment failures before they impact campus operations. Preventive maintenance schedules are reviewed and adjusted as needed based on equipment history, manufacturer recommendations, regulatory requirements, inspection findings, and changing facility needs. Through the continued use of technology, including Asset Essentials, the District is enhancing documentation, improving communication, and increasing accountability while exploring opportunities to incorporate emerging technologies, including artificial intelligence, to further optimize maintenance planning and decision-making. The combination of routine on-site inspections, technician

observations, preventive maintenance activities, and work order data provides the Facilities Department with multiple methods of identifying and addressing facility needs.

This ongoing improvement process supports reliable building systems, extends asset life cycles, reduces the potential for unexpected failures, and helps maintain safe, efficient, and well-maintained learning environments for students and staff.

8. **Celebrate Success:** Identify preventive maintenance success, cost avoidance and set PM goals for next fiscal year.

Since the implementation of the new Asset Essentials work order management platform, the District has experienced significant improvements in efficiency and productivity. The system has reduced the amount of time required to review and update previous preventive maintenance work orders and assets while providing a more user-friendly and intuitive platform for managing maintenance activities.

The primary focus of the Facilities Department at this time is to update and verify the District's asset inventory within Asset Essentials. This includes reviewing existing asset records, adding missing equipment, removing obsolete assets, verifying equipment information, and adding asset photographs and other documentation that the prior work order program did not support. As part of this effort, the District plans to add QR code labels to each applicable piece of equipment throughout the District, when applicable. These QR codes will allow technicians to quickly identify equipment and access its Asset Essentials record, including maintenance history, manufacturer information, manuals, and preventive maintenance requirements.

Signatures:

Governing Board President Name: Tom Logue

Governing Board President Signature: _____

Date: _____

Superintendent Name: Dr. Denise Bartlett

Superintendent Signature: _____

Date: _____

Facility Director Name: Brian McNitt

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