NATIONAL SCHOOL INFRASTRUCTURE MAINTENANCE GUIDELINES

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i Definitions

The following constitutes a draft breakdown of definitions that are relevant to maintenance planning considerations. Consequently in these guidelines, unless the context otherwise indicates:

- “accounting officer” means in relation to a national or a provincial department, a person mentioned in Section 36 of the PFMA and includes any person acting as the accounting officer;
- “acquisition”
  i. For national government, means acquisition through construction, purchase, lease, acceptance of a gift/donation, expropriation, exchange, or transfer of custodianship between custodians in that sphere of government; and
  ii. For provincial government means acquire as defined in the relevant provincial land administration law or transfer of custodianship between custodians in that sphere of government;
- “best practice” means a desirable and appropriate standard, process, procedure method or system in relation to immovable asset management;
- “best value for money” means the optimization of the return on investment in respect of an immovable asset in relation to functional, financial, economic and social return, wherever possible;
- “custodian” means a national and provincial department referred to in section 4 represented by the minister of such national department, Premier of a province or MEC of such provincial department, so designated by the Premier of such a province;
- “custodianship” means the execution of such functions contemplated in section 4 (2);
- “disposal” means any disposal contemplated in the State Land Disposal Act, 1961 (Act no 48 of 1961) or a provincial land administration law;
- “immovable asset” means any immovable asset acquired or owned by government, excluding any right contemplated in the Mineral and Petroleum Resources Development Act, 2002 (Act no 28 of 2002);
- “immovable asset management” means those management processes which ensure that the value of an immovable asset is optimized throughout its lifecycle;
- “immovable asset management guidelines” means the guidelines published by the minister in terms of section 19 which a custodian or user may use to develop its immovable asset management plan;
- “immovable asset management plan” means a custodian asset management or a user asset management plan, as the case may be, prepared in accordance with section 6;
- “reconfiguration” means the implementation of activities to make changes to the configuration of an immovable asset and thereby changing the functionality of the asset. An example of reconfiguration is to make changes to the internal walls of a building to develop open plan offices. Reconfiguration cannot be classified as maintenance as it comprises changes requested by a user to increase the functionality of the asset to contribute towards the achievement of service delivery objectives. A User therefore initiates reconfiguration whereas a custodian initiates maintenance;
- “renovation” means comprehensive capital works actions intended to bring an immovable asset back to its original appearance. Renovation works do not necessarily extend functionality or the life of the asset, but are necessary for the planned life to be achieved. In such cases, the capital value of the asset is not achieved;
• “refurbishment” means comprehensive capital works actions intended to bring an immovable asset back to its original appearance or state or to extend its lifecycle. It may be also required for historical preservation. Refurbishment generally takes place at the end of an asset’s lifecycle to extend the lifecycle and gain further income potential from the asset;
• “upgrade” (Extensions, additions) means comprehensive capital works that increases the value of the asset and extend the area or add new functionality of the asset. Upgrades can take place at any time through the lifecycle of the asset and will increase the income potential of the asset;
• “lifecycle” means the period during which a custodian or user expects to derive benefits from the control or use of an immovable asset;
• “MEC” means a member of the Executive Council;
• “Minister” means the Minister responsible for Public Works;
• “organ of State” means any department of state or administration contemplated in paragraph (a) of section 239 of the Constitution of the Republic of South Africa, of 1996, but excluding the department or administration in the local sphere of government;
• “PFMA” means the Public Finance and Management Act, 1999 (Act no 1 of 1999);
• “prescribe” means prescribe by regulation;
• “provincial Land Administration Law” means the Acts listed in the schedule;
• “standard” means the minimum standard, process, procedure, method or system in relation to immovable asset management and the life-cycle of immovable assets issued in terms of section 19;
• “strategic plan” means the strategic plan of a custodian or user as prescribed in terms of the Public Service Act of 1994, (Proclamation R103 of 1994) and the PFMA;
• “surplus” in relation to an immovable asset, means that the immovable asset no longer supports the service delivery objectives of a user;
• “this Act” includes any regulation or standard issued by the Minister;
• “treasury” means the National Treasury or a provincial treasury, as defined in section 1 of the PFMA; and
• “user” means a national or provincial department that uses or intends to use an immovable asset in support of its service delivery objectives and includes a custodian in relation to an immovable asset that it occupies or intends to occupy represented by the minister of such national department, Premier of a province or MEC of such provincial department, so designated by the Premier of that province.
1 INTRODUCTION AND BACKGROUND TO MAINTENANCE

In 1996 two years after the democratic transition, the Department of Basic Education (DBE) launched the first school register of needs (SRN) survey. This survey covered the conditions of school buildings and available facilities in all the 26,734 ordinary schools. The 1996 SRN provided an invaluable baseline database on the provision of school infrastructure and basic services. Since then the data has been updated and elaborated upon in 2000 and again in 2006. The 2000 SRN covered 27,148 ordinary public and independent schools. It went further than the 1996 survey to include a further 3,000 institutions previously not covered and 390 schools for learners with special needs (ELSEN). In addition to public schools, the 2006 survey, referred to as the National Education Infrastructure Management System (NEIMS), included public Early Childhood Development (ECD) centres, adult basic education and training (ABET) centres, centres for the education of learners with special needs (ELSEN), and education offices operated by the DBE.

The NEIMS adopted a systemic approach that differs from the previous two surveys. Its invaluable additions included standardized assessment instruments, a web-based database and a GIS-based infrastructure management system that will become an integral part of the overall Facilities Management System or FMS.

The NEIMS has documented a significant deterioration in the condition of schools owing to poor and even no maintenance. Consequently in the formulation of the new policy document, together with its related Norms and Standards, specific reference was made to the establishment of a National Maintenance Policy. It should be noted at this stage that a Maintenance Policy will need to be situated within an Asset Management Policy since an Asset Management Policy constitutes the overall policy framework required for asset management, and maintenance forms but a part of this overall policy framework.

2 OBJECTIVES OF THE DEPARTMENT OF BASIC EDUCATION’S NATIONAL SCHOOLS INFRASTRUCTURE MAINTENANCE GUIDELINES

The following constitutes a set of Draft Objectives for the National Department of Basic Education (DBE) with respect to maintenance policies and plans in the nine provinces. The DBE should ensure that

- Each of the nine Provincial Departments of Education (PEDs) must provide clear objectives for the preservation/maintenance of its buildings/immovable assets;
- These objectives need to support the delivery of PED services and achieve synergy between the objectives of related sector departments;
- Each Custodian of a province will need to put in place or in the case of a User (PED or DPW) arrange for access to an up to date and GIAMA compliant asset register of its immovable assets (schools in this case);
- Each PED will need to contribute to the regular updating of the National NEIMS data base as prescribed in the DoRA;
- Each PED needs to identify at a strategic and operational level those officials and or departmental units responsible for the planning, budgeting, preservation, management, recording, monitoring and evaluation of these assets;
• The maintenance/preservation policy of each PED will need to address the planning, budgeting and implementation of planned preventative and other relevant forms of maintenance on a continuous basis;

• According to GIAMA it is incumbent on all users and in this case PED’s to annually assess the functional performance of all immovable assets allocated to them. This rating will provide a simplistic basis for the prioritization of maintenance.

• Each PED will need to prepare asset management plans to implement the planning, budgeting, implementation and monitoring of its maintenance policy and strategy;

• Each PED will need to establish its maintenance reporting systems and templates that can be easily accessed by a Facility Management System of the National Department of Basic Education;

For all the above objectives to be monitored for compliance and progress a monitoring and reporting system needs to be in place to link the PEDs with both the National Treasury and the DBE via an IDIP maintenance reporting procedure currently being addressed by the Cidb in its efforts to revise the IDIP Toolkit.

3 DIRECTIVES EMANATING FROM THE DEPARTMENT OF BASIC EDUCATION POLICY DOCUMENT ON SCHOOLS INFRASTRUCTURE

The following directives are drawn from the Department of Basic Education Policy for an Equitable Provision of an Enabling School Physical Teaching and Learning Environment:

Under Policy Statement #4: Management and Maintenance the DBE is required to “have developed a national policy on the management of immovable assets” and it will also need to “develop a Comprehensive Maintenance Policy for school infrastructure, basic services, furniture and equipment”. The policy will refer to “norms and standards for preventative and corrective maintenance” The policy document also acknowledges the existence of a variety of provincial maintenance policies, strategies and plans and or schedules. The Policy document advocates that “notwithstanding this situation it will be incumbent on PEDs to ensure, with support from the DBE, that every effort will be made to meet the compliance requirements of current legislation (see section on legislation) and in particular GIAMA”.

Specific Education norms and standards will be established during the Cidb/DPW/NT and DBE engagement currently underway in connection with the GIAMA compliancy process relating to the establishment and maintenance of provincial asset registers. This will be addressed in the IDIP Toolkit Review process currently being finalized.

The procurement of all elements of the teaching and learning environment will need to comply with national standardized procurement policies and procedures. His will also be covered in the revised IDIP Toolkit.

Sector specific guidelines and manuals including IDIP tools are to be customized to reflect Educational policy norms and standards requirements.

4 AUTHORITY OR RESPONSIBLE AGENT/S

Depending on the assumed level of authority by a Provincial Department of Education the authority responsible for maintenance will in terms of the GIAMA policy be the Department of Public Works (DPW) until clarification declares an alternative to be acceptable. For example, in the specific case of
the Limpopo Department of Education (LDoE), the responsible authority is currently assumed to be the LDoE since it alone conducts the major proportion of the planning, budgeting and implementation of asset management and maintenance actions in the province. This assumption of the role of Custodian needs to be supported by the MEC and/or Premier of a province with its attendant responsibilities and cross-cutting agreements.

It is imperative that the organizational arrangements that embrace the IDIP programme together with the Cidb Toolkit be applied to all provinces in pursuit of their formulating, unifying and implementing their respective maintenance policies and plans. In the immediate term each PED will need to put in place an implementation plan that clearly illustrates how each department plans to blend its IPMP’s and IPIP’s and IP’s with the UAMPS and CAMPS required by GIAMA.

5 DEFINITIONS OF IMMOVABLE ASSET MAINTENANCE/PRESERVATION

The following set of maintenance types have been recognized by the Department as being appropriate to meet the differing conditions and circumstances that characterize the maintenance challenges in the province. The Education Department determines which of the following categories of maintenance are relevant to the specific conditions, capacities and resources and these are applied in both planned and unplanned forms of maintenance in its respective policies and plans;

5.1 Planned Maintenance

This form of maintenance can comprise five different types of maintenance and these include;

5.1.1 Statutory Maintenance

This form of maintenance can apply to both preventative and condition based maintenance where legislation, regulations, standards and Codes of Practice may require specific forms of maintenance to be carried out to provide what in their respective fields are regarded as the minimum form of maintenance required.

5.1.2 Preventative Maintenance

This form of maintenance comprises actions performed to retain an asset in its required condition or standard and sets out to prevent failure by providing systematic inspection and monitoring to detect and prevent deterioration and or failure and includes testing to confirm correct operation.

5.1.3 Scheduled Maintenance

These are actions performed to prevent failure in a predetermined and scheduled manner and these are normally prescribed by a manufacturer of the specific asset concerned.

5.1.4 Condition-based Maintenance

As a result of significant deterioration or failure this form of maintenance is to restore an asset to its required condition or standard. The work could be programmed in terms of condition assessments or alternatively conducted as random additions to the programme based on a prioritized process or system.
5.1.5 **Backlog Maintenance**

This form of maintenance is often referred to as Deferred Maintenance and refers to any maintenance that should have been conducted but for lack of funds or one or other reason it was deferred, cancelled or not carried out. Such maintenance action can be quantified, planned and scheduled and it is therefore classified as planned maintenance.

5.2 Unplanned Maintenance

5.2.1 **Breakdown Maintenance**

5.2.1.1 **Normal Breakdowns**

Such maintenance is generally unplanned and reactive maintenance that requires action towards restoring an asset to its respective operational condition as a result of unforeseen failure. This action is generally regarded as requiring remedial attention within a working week of 5 days.

5.2.1.2 **Emergency Breakdown**

Such maintenance is generally unplanned and reactive maintenance that requires action towards restoring an asset to its respective operational condition as a result of unforeseen failure that seriously affects the functioning of the asset. This could constitute a blocked sewer for example and due to the serious implications that could arise from the nature of this breakdown such a breakdown must be attended to within 1 day.

5.2.1.3 **Fatal Breakdowns**

These breakdowns are those breakdowns that cause serious damage to associated, linking, and or surrounding assets and could cause the loss of a resource such as water or electricity and or could result in a danger to people and loss of life. The status of fatal could fall away and a lower order status assigned to the asset breakdown once the cause of the fatal status is removed, for example:

- A burst pipe could assign a fatal status to a breakdown and once a valve, for example, is closed the fatal status could fall away thereby stopping the loss of a resource such as water; or

- The fatal status of an open electrical wiring system would fall away once the wiring is made safe by switching off the power to that circuit.

These forms of breakdown need to be attended to within 3 hours.

5.2.1.4 **Incident Maintenance**

Such maintenance is generally unplanned and reactive maintenance that requires action towards restoring an asset to its respective operational and or safe condition as a result of damage from storms, fire, forced entry, vandalism or malicious actions. The timeframe within which such maintenance should be carried out will be determined by the nature and seriousness emanating from the incident.
5.2.1.5 Minor Repairs < R500 000

Such maintenance is intended to restore an item to an acceptable condition by the renewal, replacement, or mending of worn, damaged or decayed parts.

5.3 Rehabilitation

Such maintenance is intended to restore an asset to its intended useful life.

5.4 Major Repairs > R500 000

Such maintenance is intended to restore an item to an acceptable condition by the renewal, replacement, or mending of worn, damaged or decayed parts.

5.5 Renovations

This type of maintenance comprises actions that are carried out to restore an asset, which has deteriorated to an unacceptable condition, to its original “as new” condition.

5.6 Minor New Works

This form of maintenance involves minor reconfiguration, additions or new construction work up to the financial limit, which may be revised from time to time.

5.7 Replacement

This form of maintenance comprises actions that are carried out to demolish an asset that has been deemed to have reached the end of its life and to replace it with a new asset of a similar size and level functionality.

It is, however, not always appropriate to replace the same size as many classrooms may be undersized and need to be replaced with a structure that meets the departmental norm.

6 INTEGRATING GIAMA AND IDIP RELATED PLANNING PROCESSES AND INSTRUMENTS

The integrating of the current IDIP planning instruments such as the Infrastructure Plans (IP’s), Infrastructure Programme Management Plans (IPMP’s) and Infrastructure Programme Implementation Plans (IPIP’s) is an important process in the establishment and management of a Maintenance Policy. This is particularly important in terms of the imminent introduction of GIAMA related requirements and planning instruments such as the U-AMPS and C-AMPS together with the roles of both “User” and “Custodian”.
6.1 GIAMA requirements

GIAMA requires that by 01 April 2010 all PEDs provide:

- A uniform framework for the management of immovable assets;
- Coordination between the use of immovable assets and service delivery objectives; and
- A set of minimum standards and principles that are applied in respect of effective immovable asset management and maintenance.

GIAMA also defines the specific roles of both users and custodians of assets and that more specifically GIAMA requires that both a U-AMP (User plan) and a C-AMP (Custodian plan) be in place. To meet this requirement the National DBE requires that each PED puts in place its GIAMA Implementation Plan, with milestones and delivery dates, to plot and commit itself to the GIAMA planning requirement deadlines.

6.2 Reporting Formats and Planning Relationships

How the reporting formats will need to be configured will be guided by outputs from the current Cidb initiative assisted by the National Treasury in which national maintenance arrangements and requirements will be formulated and shared with its stakeholders before being finalized. A national initiative that addresses the establishment of a Facilities Management System is in the process of determining what suite of reports and procedures would serve the compliance and progress reporting requirements of the National Department of Basic Education.

In Diagram 1 an attempt has been made to illustrate the relationship between the roles of User and Custodian and their respective statutory planning requirements. GIAMA requires that a U-AMP is required from a user which can be the PED in one sense and in another sense the Department of Public Works (DPW) where in its property portfolio the DPW is a user as well as a custodian. In the preparation of a U-AMP a PED will need to prepare a U-AMP by combining the contents of both the existing Infrastructure Plan (IP) with an appropriate Capacitation Plan, (Cap. Plan). The PED will also need to establish a Service Level Agreement (SLA) with the Department of Public Works. Inputs to the SLA will include relevant components of IDIP’s IPMP and IPIP. Where the DPW is the Custodian and consists of both property and Infrastructure portfolios an additional SLA will be required to cement the relationships between the two portfolios. The Custodian (DPW) will need to prepare a C-AMP that accommodates the assets in both portfolios. These assets will of necessity be configured in an asset register under the responsibility of each of the two portfolios. A provincial maintenance plan will then need to address the assets from each of the portfolio asset registers or sections of one combined asset register.
An arrangement will need to be forged between the PED’s and their related DPW’s who in accordance with conditions in the DoRA Framework will need to provide as annexure in their respective Quarterly Reports updated conditional assessments of all projects completed within the relevant quarter. This will enable the regular updating of the national NEIMS data base.

When a provincial DPW in terms of its Property and or Infrastructure Portfolio enters into a procurement arrangement with an Implementing Agent an appropriate contract will need to be secured in terms of Cidb procurement best practice.

Clearly where alternative positions have been negotiated at provincial government level relationships might be somewhat different from what has been depicted in Diagram 1. However the Cidb Toolkit SDA and contractual arrangements will need to be complied with. Where a custodian (DPW) is a user (property division) it will also need to produce a U-AMP.

### 6.3 Assignment of custodianship to a user department

A Minister, Premier or MEC of a Custodian, for example, the Department of Public Works (DPW) can in terms of a written instruction assign the custodianship of a provincial department to any organ of state which can, for example, be a User Department such as a Provincial Department of Basic Education.

### 6.4 Maintenance in the lifecycle of an immovable asset

Lifecycle means the period during which a custodian expects to derive economic benefits from the control of an immovable asset. All immovable assets must be managed based on lifecycle principles. The phases through which an asset passes during its life are the:
- Planning phase, where the requirement for a new asset is planned for and established;
- Acquisition phase, where the asset is purchased, constructed or otherwise created;
- Operation and Maintenance phase, where the asset is used for its intended purpose; and
- Disposal phase initiated when the economic life of an asset has expired, or when the need for the service provided by the asset has ceased.

Immovable assets typically have a long life. These assets consume resources to acquire or create and to keep them in operational condition over the whole asset lifetime. Many decisions about assets are enduring and have long term implications. Because of these characteristics, it is helpful to consider the use of assets in terms of their lifecycle cost and in particular pertaining to the maintenance cost of the asset.

6.5 Maintenance cost as part of lifecycle costing

The use of lifecycle costing techniques allows a full evaluation of the total cost of owning and maintaining an immovable asset prior to acquisition. This creates the opportunity to determine the most cost effective maintenance solution. Estimating lifecycle costs prior to acquisition (or on a regular basis for the remaining useful life) also establish a standard, which is the basis for monitoring and controlling costs during operation and maintenance. Lifecycle costing should be included during the immovable asset planning phase to determine the economic feasibility of the acquisition of immovable assets. The following costs should be included in determining the total cost of a major asset:

a) Planning costs: The costs associated with developing a capital asset solution to a stage ready for acquisition. These costs include elements such as scientific studies, environmental impact studies and feasibility studies.

b) Capital costs: Capital costs are the costs of acquisition and may also be incurred in later upgrades or rehabilitation. Capital costs include:

   I. Purchase price and all associated fees and charges, import duties, non-refundable purchase taxes, and the delivery and installation costs, and any directly attributable costs of bringing the asset to working condition for its intended use.

   II. Acquisition costs associated with the initial construction of an immovable asset, including costs such as professional services, building or construction costs.

   III. Planned renovations, major repairs and refurbishments over the asset’s life.

c) Recurring costs: Recurring costs (current) are also referred to as operating or running costs. Recurring costs include energy, maintenance and cleaning costs and may also included employee costs where specialist staff is dedicated to the operation of the asset.

d) Disposal cost: This includes all costs of disposal of a capital asset, for example, agent’s commission and dismantling (demolition) costs. Disposal costs may also included the financial loss on an asset disposed of prior to expiration of its expected useful life due to circumstances beyond the entity’s control, such as assets becoming
environmentally unacceptable. Conversely, the potential gain from disposal must be taken into account upon sale of assets such as land.

7 LEGISLATION GOVERNING MAINTENANCE

The following forms of legislation will constitute the legislative framework that will govern and influence the establishment and management of asset management and maintenance policies in each of the nine provinces;

7.1 Public Finance Management Act (PFMA), No. 1 of 1999

7.1.1 The PFMA supports the proper management of assets and their maintenance. According to Section 38(1)(d) of the PFMA, the accounting officer for a department, trading entity or constitutional institution is responsible for the management, including the safeguarding and the maintenance of the assets of the department, trading entity or constitutional institution. As a result, every department, trading entity or constitutional institution needs an asset management system which is a base for proper planning and budgeting for maintenance.

7.1.2 In addition, section 76(2)(d) of the PFMA also states that National Treasury (NT) may make regulations or issue instructions applicable to departments, concerning the improvement and maintenance of immovable assets. As part of this mandate NT can inform the conditions that influence the nature of conditional grants – such as the Infrastructure Grant to Provinces (IGP). This is done through the Division of Revenue Act (DoRA).

7.2 Government Immovable Asset Management Act (GIAMA), No.19 of 2007

7.2.1 GIAMA provides a framework for the management of immovable assets and will be binding on national and provincial government. The broad aim of the Act is to improve public sector infrastructure asset management.

7.2.2 One of the objectives of GIAMA, among others, is to ensure that there is coordination in the management and use of immovable assets in fulfilling the service delivery objectives of a national or provincial department. The Act promotes the efficient utilisation and maintenance of existing immovable assets. Section 5(1)(d) specifically states that immovable assets that are currently used must be kept operational to function in a manner that supports efficient service delivery.

7.3 Municipal Finance Management Act (MFMA), No. 56 of 2003 and Municipal Systems Act (MSA), No. 32 of 2000

7.3.1 Although operating in another sphere of government, dealing with asset management and maintenance represents a unique set of challenges. To address these, policy makers developed specific legislation for local government in the form of the Municipal Systems Act of 2000, and the Municipal Finance Management Act of 2003.
7.3.2 Section 4(2)(d) of the MSA states that a municipality has the duty to strive to ensure that municipal services are provided to the local community in a financially and environmentally sustainable manner.

7.3.3 The MFMA (section 63) delineates specific duties in respect of asset management, i.e. the safeguarding and maintenance of assets; valuation in accordance with Generally Recognised Accounting Practice (GRAP); maintaining a system of internal control over assets and keeping an asset register.

The lack of an adequate set of guidelines and strategy supporting asset management at the local government sphere and linking in some way to the provincial sphere is currently undermining the performance of the above legislation.

7.4 South African Bureau of Standards: National Building Regulations

These sets of building regulations will set out the regulatory framework that governs construction in all sectors especially at the local government level where building inspectors will need to ensure that statutory requirements are complied with. With regard to the provision of electricity, provision is made in SABS 10400 of specific requirements for the maintenance standards to be complied with.

The strategic planning of each PED will need to also take account of those types of ground condition that are referred to in the SABS NBR’s as SANS 1936-4 and SANS 634.

7.5 Division of Revenue Act (DoRA)

The 2010 DoRA Framework will set out the necessary conditions and requirements for each PED to access the necessary IGP budget allocations from the National Treasury.

7.6 Occupation Health and Safety Act of 1993

Every PED shall provide and maintain as far as is practically possible a working environment that is safe and without risk to his/her employees. Each PED will need to establish the necessary

i. Health and Safety committees at each school whose duty it is to address the necessary statutory and regulatory requirements, and

ii. Designated officials to monitor and address the OHS concerns of each facility.

7.7 Others

8 ROLES AND RESPONSIBILITIES

The following roles and responsibilities have been established and assumed for the School Governing Bodies (SGB’s), DBE and the PED’s:

8.1 Role and Responsibilities of National Department of Basic Education

The role and responsibility of the National Department of Basic Education must be seen in terms of current legislation such as the Constitution, PFMA and DoRA. This
would entail being responsible for policy formulation and implementation, oversight and reporting on compliance, progress and support for the nine PEDs. In addition the following roles and responsibilities will need to apply to School Governing Bodies (SGB’s) and the Provincial Departments of Education.

8.2 Role and Responsibilities of the School Governing Bodies:

In terms of the South African Schools Act, School Governing Bodies need to take responsibility for planned and unplanned maintenance and repairs using the school’s fund allocation provided by the Provincial Departments of Education. Maintenance includes planned preventative maintenance and reactive maintenance to address breakdowns and emergencies.

Section 21 School Governing Bodies that have maintenance responsibilities assigned them will need to conduct both day-to-day maintenance responsibilities as well as more serious responsibilities as set out in Annexure 1.

While the schools allocation covers routine planned and unplanned maintenance work, major repairs and maintenance are generally too expensive for most schools. School Governing Bodies are therefore encouraged to take out building insurance using the school fund allocation as provided for in the South African Schools Act.

The capacitation of school governing bodies to better utilise the school’s norms and standards allocation from the PED’s more efficiently and effectively for schools based maintenance needs to be considered. Guideline documents need to be shared with all SGB’s.

Training material needs to be made available to train PED governance officers, who in turn should be supported to train and support SGB’s.

Standard forms of contract for routine maintenance and building assessments. (Linkage required here with assessment forms of the DBE.)

A monitoring and management tool is required to track maintenance done at each facility. (Linkage is required here with GIAMA requirements.)

8.3 Role and Responsibilities of the Provincial Department of Education

The GIAMA makes it incumbent on custodians and users, as appropriate to their functions, to demonstrate that it is managing immovable assets efficiently and effectively and in such a way as to promote government’s immovable asset management objectives. In this context, each Provincial Department of Education should:

- Assume full responsibility for the planning, budgeting, procurement, implementation, monitoring and evaluation of its maintenance policy and plan;
- Provide clear objectives in its Policy and Implementation Plan for the preservation/maintenance of its buildings/immovable assets and these should be directed towards;
  - minimising the maintenance cost throughout the life-cycle of immovable assets;
establishing priorities based on the impact of condition on service delivery and risk;

- standards to which immovable assets are to be maintained and these must align with the service delivery of the users;

- ensuring the most effective use of maintenance resources;

- monitoring the performance of the assets to ensure that the maintenance strategies are working;

- ensuring that historic maintenance information exists for the assets;

- clearly articulating how these objectives will support the delivery of PED services;

- putting in place or if able accessing an up to date and GIAMA compliant baseline asset register of its immovable assets (Updated version of the NEIMS, for example);

- identifying at a strategic and operational level those officials and or departmental units responsible for the planning, budgeting, preservation, management, recording, monitoring and evaluation of these assets.

- In its maintenance/preservation policy it will need to address the planning, budgeting, implementation, monitoring and reporting of its planned preventative and other relevant forms of maintenance on a continuous basis;

- Provide support to non-section 21 schools that do not have maintenance responsibilities assigned to them;

- Prepare guidance documents and make these available to School Governing Bodies (SGB’s) for repairs and maintenance using the schools allocation fund. In addition, PED Governance Officers will need to be appointed and trained to support schools in maintenance management.

- Prepare asset management plans to implement the planning, budgeting, implementation and monitoring of its maintenance policy and strategy;

- Establish reporting systems and templates that can be easily accessed by the National Department of Basic Education;

- Such reporting systems will need to be in line with the Cidb Toolkit maintenance best practice procedures.

According to GIAMA, the key outcomes to be achieved through maintenance in order of priority are:

Priority 1: All statutory and technical requirements to ensure health and safety, security and reliability are met;

Priority 2: The physical condition of immovable assets is kept up to a standard appropriate to their service function and value to the community; and
Priority 3: Functional and operational requirements of the working environment are met.

9. PROCUREMENT POLICY FOR PSP’S

Currently organs of state with few exceptions apply time-honoured and standard forms of procurement strategies and consequently they fail to make use of the wide range of procedures and methods described in the Cidb Toolkit. In examining this situation an initiative was launched involving the Business Trust, the Limpopo Department of Education and the National Department of Basic Education to fill a gap in the Cidb suite of best practice tools and procedures in generating a generic form of Education-based infrastructure procurement and contracting strategy for use by a provincial department of education and then customizing this strategy for a specific PED. It is suggested that the outputs form this initiative form the basis for provincial procurement and contracting strategies.

10. FUNDING ARRANGEMENTS

The following funding arrangements will need to be carried out by the PED’s;

10.1 Infrastructure Grant to Provinces (IGP)

It is envisaged that two forms of maintenance will need to be funded from this budgetary allocation to the provinces and these comprise both planned and unplanned or deferred maintenance initiatives. Provision will need to be made for such maintenance in the current Infrastructure Plans and, as of 01 April 2010, the UAMPS of the PEDs (User Departments), using the range of alternative forms of maintenance listed in Section 5 of this policy document.

The conditions under which these funds can be budgeted for will be included in the 2010 version of DoRA and a specific amount will need to be ring-fenced for maintenance purposes. Until a more specific guideline can be made available, an amount of at least 4%-5% of the PEDs budget figure will need to be ring-fenced by the PED for sole application in maintenance activities.

10.2 Equitable Share

The current formula for the determination of the Equitable Share to be allocated to provincial treasuries is under review by treasury. However, during the interim the current approach remains in place. National Treasury determines the allocation per province and the criteria applied does not in any way reflect the maintenance requirements of a provincial government. This is because the formula is based on basic demographics and do not reflect the condition of the asset base of each respective provincial government. The use of learner numbers and possibly age quintiles has no relationship with asset conditions.

Responsibility for the apportionment of funding that will be assigned to maintenance lies with each provincial treasury and it appears that little or no consideration is applied, for example, the condition records of schools in the national NEIMS data base.

The Department of Basic Education requires of each provincial treasury in collaboration with the PED to establish the maintenance backlogs using its
own updated or in its absence the national NEIMS data base which is being cleaned and updated on a regular basis where PEDs have collaborated with the national Department of Basic Education.

10.3 Provincial Allocations

Provincial allocations will be made available from national treasury to provincial treasuries for allocation to PEDs for allocation to all public schools. PED’s will make an allocation to section 21 schools where functional responsibilities, including maintenance, lies with the SGB’s. It will need to be stipulate how these allocations are to be utilized, for example, in Gauteng, 55% goes to LTSM purposes, 33% goes for services and 12% goes to maintenance.

For those schools who are non-section 21 schools, PEDs will receive an amount to be used for the three categories of work for these public schools. In this case the specific PED will need to plan, budget and arrange for payment of services whilst at the same time addressing the LTSM and services needs of these schools.

School governing bodies should use the schools fund allocation provided by each PED effectively for schools based maintenance.

10.4 Other considerations

10.4.1 School Facilities Maintenance Contracts

It is proposed that schools maintenance should be delivered through two types of services contracts, namely:

a) School Facilities Maintenance Contracts which maintain the fabric of school buildings, and
b) School Building Services and Equipment Contracts, which maintain specialist equipment such as science laboratory equipment.

10.4.2 School Facilities Maintenance Contractors should provide for the following services:

a) Structure
b) Building exterior
c) Building interior
d) Plumbing
e) Electrical
f) Grounds

Contractors should develop performance based specifications, for example,

- To achieve weatherproofing throughout the school terms
- Uninterrupted electricity supply within the school electrical reticulation (obviously they will not be responsible for mains supply etc.)
10.4.3 Implementation of Term Contracts

Under term contracts, contractors should provide a guarantee for a fixed schedule of services and rates for schools over an agreed period. The contractors will invoice schools directly for all work carried out. District offices however should get involved in:

a) The monitoring of contractors and their programmed services to ensure all necessary work is carried out in a timely and professional way
b) Support to resolve any disputes between a school and a contractor
c) Regular contact with both the contractor and schools to discuss any issues.

The ability and capacity of District Office(s) officials to perform relevant tasks must be embedded in their job description and performance contracts.

These options are dependent on the direct maintenance contract between the school (SGB) and contractor.
The necessary capacity for a principal and School Governing Body to conduct the above should be in place, as well as the capacity of District Offices to conduct oversight.

10.4.4 Process Alignment

The proposed National Schools Infrastructure Maintenance Guidelines are also dependent upon the establishment of clear governance and accountabilities that should be aligned with the following processes:

a) Development of Operational Practises.

This requires the necessary budget and policy alignment together with criteria for allocation of maintenance budget, for example, based on condition assessment to address “strategic maintenance first, size of school, and the academic performance of schools”
b) Development/approval of the Procurement Strategy
c) Contract documentation and tender/negotiation
d) Development of work practise guidelines and training modules
e) Condition and Functionality assessments incorporated within the Infrastructure Asset Management system(s).
f) Formal service partnership agreements between Schools and Contractors

With regard to delegations to District Offices and School Principals, PED’s should monitor how schools are using maintenance funding to ensure that value for money is achieved;

10.4.5 Standardisation of Contracts

Contracts should be standardised around two basic models

a) Streamlined and Provincial Education Departments directed maintenance contracts.
b) Province-wide facilities management contracts in rural areas where distance requirements dictate how value will be best achieved by grouping schools in districts into the form of a holistic facilities management approach designed to meet local requirements.

c) Emergency contracts for storm repair/accidents will also be required.

10.4.6 Budgeting and Funding Options

Option 1: **Direct funding to Schools.** A school principal will direct maintenance. Provinces should publish in their budget statements the allocation for maintenance for each school.

Option 2: **Indirect funding to Schools.** District offices support Schools through procurement of service providers and lumping of contracts, School Principal directs maintenance.

Option 3: **Provincial Education Departments directed** Condition Based Maintenance using the National Education Infrastructure Maintenance Strategy. District Offices and School Principals to determine priorities.

Option 4: Develop a **database of term contractors** and let the Provincial Education Departments award contracts per districts or municipalities. This will transfer greater risk to Contractors.

11. MONITORING FRAMEWORK

The following monitoring and evaluation reporting systems will need to be continued where systems have already been introduced. These include the IRM, IYM and the Effectiveness Report of the IDIP Programme group in National Treasury. In addition each PED will need to report to the DBE in terms of the reporting templates currently being finalized by the Cidb in collaboration with the provincial GIAMA team of the Department of Public Works (DPW) and educationl TA’s.

A custodian and in the majority of cases this will be the Provincial Department of Public Works will need to have a monitoring framework that is GIAMA compliant. This framework will in all probability be linked to the national; Departments of Public Works as well as the national Treasury and be guided by a component of the Cidb Toolkit.

12. CAPACITY BUILDING

How the capacity of each PED and related provincial treasury and department of public works will impact on the process being unpacked below can best be answered by a careful evaluation of each PED. The IDIP capacitation strategy together with its respective detailed provincial log-frames will assist pinpoint the limitations that each experience. The maintenance strategy/plan to be adopted by each PED will be largely influenced by these findings.

13. ASSET REGISTERS

The compilation of asset registers is a requirement by GIAMA and will need to be conducted by all bodies assigned the responsibility of a custodian. In most cases the
The provincial Department of Public Works will be the custodian of provincial Education assets and consequently they will in collaboration with their respective user departments compile and regularly update asset registers for the provincial government. The linkages between both users and custodians with respect to the compilation of asset registers has already been covered in section 6 (page) Integrating GIAMA and IDIP planning processes and instruments.

The Diagram 2 constitutes the current asset planning and budgeting cycle as presented by the Department of Public Works during late December 2009. This planning and budgeting cycle has serious skills and resource capacity implications for the nine provincial departments of Education, Treasury and Public Works.
ANNEXURE 1

1.1 DAY TO DAY EMERGENCY MAINTENANCE

The school governing body, in collaboration with the Principal, is responsible for the maintenance of the school building and premises. The Principal must designate an educator to take responsibility for maintenance operations. The designated educator reports to the Principal and the School Governing Body on maintenance matters, and he or she acts as the contact with the Provincial Department of Education.

As the name implies, day to day maintenance entails daily running repairs, for example, replacing light bulbs, repairing leaking taps, cleaning blocked drains, repairing locks and door handles and other minor repairs. The following are the sort of incidents that necessitate day to day maintenance checks;

- Toilet blockages;
- Water leakages, e.g. leaking water pipes, taps, valves and cisterns;
- Exposed electrical wires;
- Theft;
- Freak conditions, e.g. minor storm damage, riots or vehicle accidents.

Day to day maintenance usually involves the school and regional/district inspectors or officials. Generally when any of the above mentioned problems occur, the Principal of the school should contact the District Office or the Regional Office. On receiving the complaint, the works inspector who is responsible for the District will visit the school as soon as possible and, accompanied by some school representatives, carry out a thorough inspection of the damage. The works inspector can call out the period contractor immediately to repair minor work damage or follow up more extensive damage later.

In terms of completion of work the period contractor should obtain an approved instruction form from the regional office. On arrival at the school the period contractor should report to the schools administrative office first before starting with the work stipulated on the instruction form. Further work resulting from the work on the instruction form, or quantities that cannot be calculated, should be recorded under “additional work”.

If quantities or costs become excessive, the contractor should obtain approval from the Regional Office (Works unit) before the work may be carried out. The inspector who gave the approval should note this on the instruction form in the school file note. The Principal should sign the instruction form and stamp it as soon as the work is completed.

If the period contractor fails to have the form stamped, the reason for this should be written on the instruction form for audit purposes. Work which falls under day-to-day emergency maintenance should be completed within 48 hours of the problem being reported.
1.2 SOME APPROACHES THAT CAN REDUCE THE MAINTENANCE LOAD

Considerable maintenance of schools can be avoided if sufficient attention is given to the salient factors at the planning stage, and even during construction. The following constitutes what one PED is currently doing in this regard;

- External surfaces should be clad with face-brick or some other proven maintenance-free cladding;
- Outdoor concrete surfaces should be left in their natural state or covered with a sand-based or acrylic paint which conforms to SABS standards;
- Indoor concrete surfaces should also be left in their natural state or covered with the same finish as the plastered walls;
- The inner walls of tuition areas should be clad with a light coloured, approved face-brick up to window sill height, not exceeding one metre. This will considerably reduce the rate of deterioration;
- Roofs should be covered with tiles slate or pre-painted galvanized iron sheeting. This will reduce the rate of deterioration through weathering;
- Concealed water pipes should be copper pipes built into walls;
- Inner walls not built with face-brick should be covered with one coat of cement plaster, floated and trowelled with a steel trowel, finished with a sealer, a universal undercoat and a final coat of eggshell paint of approved colour and manufacture;
- Doors should be either hardwood framed, ledged, braced and finished with a sealer and clear varnish, or a solid core door with hardwood veneer, sealed and clear varnished. Alternatively a door may have a solid core with masonite covering, painted to specification with an approved colour;
- Toilet seats and flaps should be made of heavy duty material and NOT light flimsy plastic. An example of a robust seat and flap is the “Masterbilt” brand;
- All waste water traps in multi-storey buildings should be deep reseal traps;
- Ensure that non-slip terrazzo tiles are laid in access corridors in front of classrooms, on stair treads and risers;
- Toilets and change-room floors should always be finished with ceramic or less expensive smooth faced terrazzo tiles, laid butt-jointed, with a drainage channel against one external wall, and a
dome grate 75mm outlet, discharging into the sewerage system to permit the hosing down of floor surfaces;

- Ensure that waste water from external drinking fountains discharges into storm water channels or into the main sewerage system and that the concrete surface bed is adequate.

1.3. GENERAL PREVENTATIVE MAINTENANCE

General preventative maintenance is conducted via periodic inspections and preventative maintenance action and this includes those steps which contribute to the continued effective life of a building, even though the building does not pose a threat to life or health. These may include;

- Repainting and or repairing a roof;
- Repainting external surfaces;
- Repainting internal surfaces;
- Servicing and/or upgrading water supply services, meticulously monitoring the water consumption to ensure that there is no possibility of underground leakage which may cause subsidence or excessive bills for consumption;
- Servicing and/or upgrading of the sewage system;
- Servicing and/or upgrading of the storm water system;
- Servicing and/or upgrading of the electrical and intercom systems;
- Reviewing and/or upgrading all specialist function areas.

1.3.1 Roofs, gutters and downpipes:

Looking at roofs, gutters and downpipes is arguably the quickest way to form an impression of the state of repair or disrepair of a building, therefore it is important that;

- These elements should be cleaned regularly and be kept free of leaves, debris or other blockages.

1.3.2 Toilets and plumbing: (Need to provide advice for non water-borne systems as well)

The state of toilets and plumbing is often a matter of concern for the school management, since they may be subjected to a variety of causes such as;

- Wash–basin taps left running with the plug in position;
- Sewage disposal pipes are blocked because toilets are not flushed regularly and various other materials other than toilet paper are used and a variety of unacceptable items disposed of through the sewerage system;
• Toilet systems are deliberately damaged or vandalized and used even though they are inoperative;

• Taps, pipes, toilet seats and flaps, mirrors, towel rails, door locks and even doors are continually stolen; and walls are defaced by graffiti;

It is difficult to offer advice on how such problems may be rectified; however here are some suggestions;

• Ensure that the toilet cisterns are on the outside wall, enclosed in a duct and activated by a mechanism that operates through the wall.

• Teach learners about the correct usage of toilet facilities and make it clear that any abuse of facilities will be punished by strict disciplinary measures. These must be enforced without exception.

• Educate the learners on the correct usage of toilets in general and their own school’s toilets in particular as part of their general hygiene education.

1.3.3 Sewage disposal

Any malfunctioning of the sewage disposal system must receive urgent attention. Apart from its unpleasantness, it may spread bacteriological infections, often taking on epidemic proportions. A malfunction can be so serious that, if an immediate remedy is not available the consequences may warrant the temporary closure of the school, often at a most inconvenient time.

1.3.4 Storm and rainwater disposal

The control and monitoring of storm and rain water disposal in buildings, especially long blocks and or multi-story buildings is essential. If water finds its way down to a building’s foundations and footings during a period of rainfall, it can and often does settle in a very limited area, resulting in cracks in the superstructure. These cracks may develop to such an extent that areas of a building become potentially life threatening.

It is important to regularly check that stormwater drains are not blocked in any way and that gutters and downpipes are clean and serviceable.

During a rainy period, it is important to observe whether the water runoff presents a potential hazard, so that precautionary measures may be taken timeously.

1.3.5 Face-brick surfaces

Most people have the impression that face-brick surfaces require no maintenance. This is not the case. Certain aspects do require fairly frequent maintenance and/or repair.

• Subsidence can cause cracks in walls which can become dangerous and must be sealed or otherwise attended to, depending on the nature of the cracks.
• Often poorly pointed joints do weather, especially the perpendicular joints (perpends). This permits water penetration with consequent deterioration of the inner plaster and paintwork.

• Check these joints during the dry season or when something is clearly amiss. Affected pointings should be scraped out and repointed. Only skilled tradesmen should be allowed to do this.

1.3.6 Fire-fighting equipment

“Dry chemical powder” (DCP) pressure cylinders should be kept under strict control on an annual contract basis.

• Suppliers should ensure that the cylinders are serviceable at all times.

Should the fire-fighting equipment differ from DCP’s it should be tested regularly to ensure its effectiveness.

1.3.7 Windows

The state of windows requires regular checking since the following aspects need to be observed;

• Is the putty at the front and back still intact?
• Are all the panes intact?
• Are the catch handles and stays (peg or other) still serviceable?
• Do the window heads, reveals and sills still seal effectively?
• Is any surface rusted?

1.3.8 Doors and locks

Doors and locks are subjected to heavy use and consequent wear and tear which necessitates vigilant attention. Normal wear and tear apart, vandalism has also become a cause for concern and suitable preventative measures should be taken. For example, door hinges and locking mechanisms should be properly oiled at regular intervals.

1.3.9 Floor surfaces

Floor surfaces vary and therefore require different forms of maintenance:

• Poly Vinyl Chloride (PVC) tiled surfaces should be cleaned with an approved detergent, not polished with a wax polish or other form of treatment that contains an element which dissolves the tile adhesive;

• Terrazzo tiled surfaces should preferably be treated with an approved sealer only, simply cleaning them with an approved detergent will also suffice;

• Granolithic floor surfaces should preferably be treated with an approved sealer only, but simply cleaning them with an approved
detergent will also suffice. Do not apply wax or any other substance that can make the surface slippery. If cracks occur other than in the deliberate V joints they should be filled with an epoxy filler. Alternatively, the screed between the bordering v-joints may be removed by a qualified tradesman and re-screeded;

1.3.10 Wall surfaces (other than face-brick)

Wall surfaces may vary in both rendering and finishes. Observe all latent defects, as well as defects caused accidently or through abuse.

1.3.11 Ceilings

Ceilings require little or no maintenance. However dust that settles on top of the ceilings may cause over time soil marks on the bottom of the ceiling accentuating the brandering to which the ceiling is fixed.

Water marks, caused by leaks in the roof may also occur. Should that happen the cause (a possible roof leak) must be immediately found and rectified.

1.3.12 Site-works (including paved areas)

This heading includes entrance and other boundary gates, perimeter and other fencing, all playing fields, paved areas, parking, assembly areas, quadrangles, learner walking areas and covered passages.

- Paved areas, regardless of the surface material, require hosing down with water only. Bear in mind that water is good for cement and concrete, and prevents cracking as a result of extreme weather conditions.

Grass covered sports fields require extensive care and maintenance. Their condition will depend largely on the financial position of the school.

1.3.13 Covered passages (other than floor surfaces)

Covered passages are subject to natural weathering, damage to columns and roofs and possible graffiti. What must be carefully monitored, is willful and undisciplined behaviour, such as walking and running on galvanized sheet iron roofing, as this damages and bends the sheet iron covering. This may also occur when tradesmen walk on the roof without taking care to walk on those areas directly supported by beams only.

Nobody should be allowed to walk on galvanized sheet iron roofing unless they walk on those areas specifically supported by beams.

1.3.14 Fixtures and appliances

The Department provides a number of fixtures and appliances for school buildings. These include shelving for some storerooms and some classrooms, libraries, cleaners’ stores, kitchenettes, laboratories, resource centres, typing classrooms, etc. Other areas also have cupboards and cabinets all of which are purpose made. Because of their construction these units may be subject
to abuse. Not only are they costly to replace, but functioning without them hampers various school activities.

The principal should have areas where these fixtures and appliances are present closely monitored.

1.3.15 Electrical installations

Theft of electrical wires and fittings is on the increase. All such installations, including the intercom should therefore be closely monitored. This requires the regular checking of unused areas of the school complex.

Effective maintenance requires the appointment of a person with adequate knowledge and skills to the School Governing Body to manage the processes of calling for tenders and defining what is required as well as accepting only satisfactory materials and workmanship.

It is therefore important that all services required should be clearly defined for the purposes of competitive tendering. Only recognized and accepted tender procedures must be followed. Should any school need technical advice on any building related matter, the Department’s technical inspectorate will be only too willing to assist.

1.4 INSPECTION AND PREVENTATIVE MAINTENANCE CHECKLIST

It is recommended that the Schools Infrastructure Support Programme (SISP) Template Checklist be used as a baseline framework for the weekly and annually preventative inspection process to be conducted by each school.