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3. OPERATIONS AND MAINTENANCE PROGRAM

3.1 Purpose. This chapter provides information on the authority, policies, and responsibilities for the Operations and Maintenance (O&M) Program within the BIA. These program functions are interdependent and support the Construction Program as well as the total life-cycle management of facilities assets.

3.2 Scope. The Bureau has responsibility for establishment and implementation of a nationwide Facilities Operations and Maintenance Program that includes Improvement, Repair and Preventive Maintenance of Bureau-funded facilities for Education, Law Enforcement Services, Rural Water and General Administration (non-education and employee housing) programs. The Operations and Maintenance Program is managed by the Chief, Division of Operations and Maintenance and the Deputy Chief, Division of Operations and Maintenance. The goal of the Operations and Maintenance Program is to reduce the nationwide backlog of deferred maintenance and provide sustained quality operations of facilities. O&M daily programs are executed by local (non-OFMC) BIA Agency Superintendents and Education Line Officers under the following methodologies: bureau staff, commercial contracts (to include memoranda of agreement/understanding and interagency agreements); self-determination contracts and self-governance compacts; and tribally-controlled community school construction grants. Funding shall only be provided within available appropriations.

3.3 Bureau of Indian Affairs Guidance.

A. General Policy. It is the policy of the Bureau of Indian Affairs to provide safe, functional, energy-efficient and cost-effective facilities; and to maintain facilities to meet applicable laws, regulations, codes, and Bureau policies included in the Facilities Management Program Handbook. These procedures shall be adhered to by all Bureau of Indian Affairs and contract staff receiving federally-appropriated funds for facilities operations and maintenance.

B. Specific Policies.

(1) The Office of Facilities Management and Construction shall provide oversight, funding, policymaking and guidance of the Bureau's Facilities Management Operations and Maintenance programs.

(2) The Bureau of Indian Affairs Facilities Management Information System (FMIS) shall be maintained on site by OFMC as the official database for all BIA Operations and Maintenance programs and activities to include budget requests, management of O&M programs, reports, and distribution of funds by an O&M Allocation Formula.

(a) Accurate and up-to-date inventory data shall be maintained and verified to affect inventory data for planning and prioritizing the work as well as a requisite for O&M Allocation Formula funding requirements. Employees with appropriate authorized access and authority are to continually monitor the validity of FMIS information for accuracy and completeness and to report and correct any discrepancies.

(b) FMIS shall be used to schedule all work and financial plans, preventive maintenance, and work ticket items for associated buildings, equipment, appurtenances, and other physical assets listed in the inventory.

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(c) The O&M Allocation Formula shall determine the amount of operations and maintenance funding allocated to each facilities Location. Funding distribution is calculated using a formula that includes inventory data such as square footage of rooms in each building, and supporting utility systems such as heating and cooling systems.

(3) Facilities O&M performance and work products shall comply with all relevant codes and standards for maintaining safe environment and facilities.

(4) O&M funding shall be provided to Locations or facilities approved by the Deputy Director, OFMC after meeting these prerequisites:

- (a) Approved Agreement for Ownership and Title of facilities
- (b) Approved Plan for Demolition or Transfer of facilities
- (c) Approved Request for Space Expansion, Chapter 2.3.B(4), applicable to permanent facilities as well as portables, modulars, trailers, and towers
- (d) Approved Inventory
- (e) Final Acceptance
- (f) Certificate of Competency

(5) All Bureau and contract facilities employees shall comply with OFMC written program and financial accountability performance standards to ensure quality control and efficiency of the program.

(6) The OFMC FIXIT Technical Training component shall provide support for Bureau and contract facilities employees and tribal employees engaged in Bureau-funded facilities activities at contract, grant, and Self-Governance facilities, in order to maintain established standards of competency in the Facilities Management Program. This training will be based on program priorities, with emphasis on reducing life safety deficiencies, code violations, and the backlog.

3.4 Program Components. Specific program information on the following components will be located in the Facilities Management Program Handbook:

A. Oversight. OFMC provides oversight, policymaking, funding, technical support, and guidance for the Bureau Facilities Management Program Operations and Maintenance. OFMC shall conduct program evaluation and review to sustain the effectiveness and efficiency of operations and maintenance activities for all Bureau-funded facilities. OFMC shall provide oversight and maintain the FMIS database to substantiate the facilities inventory, O&M Allocation Formula funding, budget justification, and execution. OFMC shall provide oversight of all operations and maintenance activities executed through the FMIS.

(1) **O&M Budget.** The O&M Budget is based on need that is developed in the FMIS database, which is based on the actual facilities and conditions at each funded Location, as well as actual Location and inventory data. The FMIS then applies the O&M Allocation Formula to arrive at a funding level for each Location.

(2) **O&M Allocation Formula Funding.** OFMC provides Operations and Maintenance Allocation Formula funding for all Bureau-funded facilities. O&M Allocation

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Formula funding levels are a function of accuracy of inventory, facilities status, and cost estimates, as well as the formulation of the allocation algorithms.

(a) Actual Facilities and Conditions. O&M Allocation Formula funding levels are based in part on the actual facilities and conditions at each funded Location, and shall address the following factors: Regional cost index, student counts, efficient use of classrooms, and program administration and support.

(b) Actual Location Data. O&M Allocation Formula funding levels are also based in part on the actual expenses at each funded Location, and shall include utilities, custodial services, preventive maintenance schedules, and unscheduled maintenance.

(c) Inventory Data. O&M Allocation Formula funding levels are also based in part on the inventory data at each funded Location, including grounds, towers and buildings.

(3) Program Reviews. OFMC has Bureauwide responsibility for overseeing, monitoring, documenting and evaluating Bureau-funded facilities operations and maintenance programs. Associated oversight and evaluation encompasses all related O&M Program activities including adherence to Acquisition, Human Resources, Property Management, Budget and Financial Management, and Records Management criteria. OFMC shall determine the annual program review schedule and coordinate with respective Agencies/Locations, including entrance and exit meetings.

B. Operations. The Facilities Operations Program is an Agency/Location level program administered by the local line officer responsible for facilities. Specifically, these responsibilities include program execution involving personnel and budget. This program provides for the production, procurement, and distribution of utilities (heating, cooling, electricity, water, sewer, and communications); and services essential to the operation of Bureau programs (refuse disposal, janitorial, security, and grounds and street services), as well as water treatment plants and pumps at BIA-funded facilities. The Agency/Location is responsible for encoding and reconciling related funded maintenance activities and tasks into FMIS.

C. Maintenance. The Facilities Maintenance Program is an Agency/Location level program administered by the local line officer responsible for facilities. This program provides for the scheduled and unscheduled maintenance of buildings, structures, grounds, core rural water systems, and related utility systems owned or operated by the Bureau for the purpose of keeping them in proper, safe, and optimal operating condition or status, or to design capacity and efficiency for the conduct of Bureau programs. Included are personal services, materials and supplies, repair and replacement of tools and equipment, including vehicles used in the maintenance programs. The Agency/Location is responsible for encoding and reconciling related funded operations activities and tasks into FMIS.

(1) Preventive Maintenance. This component, an Agency/Location executed component, provides for personal services and other costs to prevent premature deterioration and breakdown of equipment and utility systems. Work consists of scheduled inspection, examination, cleaning, lubrication, and minor adjustments.

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(2) Unscheduled Maintenance. This component, also an Agency/Location executed component, provides for unscheduled but necessary repairs due to natural disasters, fire, accidents, vandalism, and other unpredictable causes.

D. Telecommunications Improvement and Repair (TI&R). The TI&R component provides O&M for the BIA's telecommunication towers and related facilities, including all telecommunications systems, related services, and facilities owned and/or operated by the Bureau. This component is managed by the Chief Information Officer (CIO) in conjunction with OFMC, the Director, Office of Justice Services (OJS), Federal Aviation Agency (FAA), National Telecommunications Information Administration (NTIA), Federal Communication Commission (FCC), and Department of Interior (DOI) directives.

E. Energy. The Energy component, managed by OFMC, establishes the requirement for an Energy Management Program within the BIA. OFMC is responsible for the planning, budgeting, implementation, and evaluation of energy management and conservation initiatives. OFMC provides oversight for annual Bureau plans, basis for accomplishing mandated goals and guiding the Bureau's energy management plan. OFMC provides the annual energy management reporting in accordance with the established guidelines of DOE. OFMC has responsibility for implementation of a sustainable energy-efficient facilities program to reduce the total energy consumption in all Bureau-funded facilities. This includes the cost of data collection and analyses, conferences, workshops and other training costs, and costs of developing, monitoring and reporting of annual energy statistics and on progress of the program. Agencies/Locations shall keep current and provide all relevant energy data for the annual reporting requirement. Further Energy policies and components are addressed in Chapter 6.

F. Boiler. The Boiler component, managed by OFMC, establishes, formulates, and implements the boiler policy for technical, instructional, and management for safe installation, operation, care, and inspection of all boilers within the Bureau. The Agency/Location is responsible for implementing boiler safety. This includes assuring that all operating personnel under his/her jurisdiction have proper safety and operational training, that proper protective devices are provided to assure safety of all operating personnel, and that all pertinent personnel are aware of an in compliance with the requirements of these rules and regulations. The Agency/ Locations shall maintain a copy of all records pertaining to the installation, operation, maintenance, and inspection of all boilers and pressure vessels located within their jurisdiction.

G. Facilities Improved Excellence Through Increased Training (FIXIT). OFMC manages and executes the FIXIT component. FIXIT is an established technical training program in support of executing the operations and maintenance and related facilities activities to provide safe, economical, efficient, and code-compliant Bureau-funded facilities. Training is provided annually on a priority basis to Bureau and contract employees responsible for operations, maintenance, and related activities at Bureau-funded facilities, with emphasis on reducing life safety deficiencies, code violations, and the backlog. Training is also provided for certification or recertification requirements for special systems or components (i.e., boilers, water treatment facilities).

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H. Employee Housing. This program addresses OFMC's Bureauwide responsibility for overseeing, monitoring, documenting, evaluating, operations, maintenance, construction, and funding of employee housing in support of Bureau programs. Associated oversight and evaluation encompasses all related program activities including adherence to Acquisition, Human Resources, Property Management, Budget and Financial Management, and Records Management criteria. Further policies, processes and components are addressed in Chapters 4 and 5.