MAINTENANCE VS. CONSTRUCTION WORKFLOW

**NEED:**
- Construction or Maintenance?
  - YES
  - NO

- Is the value of ALL project (i) LABOR, (ii) MATERIALS and (iii) FIXED EQUIPMENT $50K or less? (Note: Projects over $35K and less than $1MM must be approved as a Minor Capital Project.)
  - YES
  - NO

- Is the need required on a routine and recurring basis (e.g., scheduled maintenance)?
  - YES
  - NO

- Is the need to bring the equipment, property, facility or building system back to a fully functional state?
  - YES
  - NO

- Is the need to ensure that the equipment or building system retains its functionality for its anticipated useful life (i.e., preservation, upkeep)?
  - YES
  - NO

- Is equipment purchase a duplicate or replacement in-kind?
  - YES
  - NO

**Construction (D&CS):** Construction consists of moving, demolishing, altering, upgrading, renovating, installing or building a structure, facility, or system according to a plan or by a definite process. Construction consists of the application of any of these techniques to physical plant facilities such as a structure, utilities, excavations, landscaping, site improvements, drainage systems, and roads; or additions, deletions, or modifications of such facilities. Exterior and interior painting or repainting services ($525K are forms of construction.)

- Construction consists of the application of any of these techniques to physical plant facilities such as a structure, utilities, excavations, landscaping, site improvements, drainage systems, and roads; or additions, deletions, or modifications of such facilities. Exterior and interior painting or repainting of new or existing structures are forms of construction, not maintenance. The upgrading or replacing of a building system when it has exceeded its useful life is generally construction.

**Repair (D&CS):** Repair does not include any matter than could reasonably be characterized as maintenance. Repair means to restore property, machinery, systems and facilities, including buildings, roads, and grounds and their components, to working order and may require the submission of plans; the submission of calculations; construction inspection requirements; and other data to ensure compliance with the California Building Code; and/or requires a change to the stamped plans, specifications, reports or documents used for its construction.

**Maintenance (FM):** Maintenance is the upkeep and preservation (not improvement) of property, machinery, systems, and facilities, including buildings, utility infrastructure, roads and grounds. Maintenance consists of those activities necessary to keep facilities and systems operational and in good working order. It consists of the preservation, but not improvement, of buildings and grounds; other real property improvements and their components. Maintenance may include replacement of components of equipment or building systems (roof, flooring, HVAC, etc.). Replacement of a component of a building system (for preservation, not improvement) is a form of maintenance when the replacement of the component is a duplicate replacement in-kind, or a minor deviation from the original if a duplicate is obsolete or is no longer reasonably available.

- Is the value of the work $50K and can ALL of the work be performed by in-house staff without assistance from outside contractors? (Note: interior/exterior painting or repainting services $525K are forms of construction.)
  - YES
  - NO

- Is the need to ensure that the equipment or building system retains its functionality for its anticipated useful life (i.e., preservation, upkeep)?
  - YES
  - NO

- Is the need to bring the equipment, property, facility or building system back to a fully functional state?
  - YES
  - NO

- Is equipment purchase a duplicate or replacement in-kind?
  - YES
  - NO

- If in-kind equipment is obsolete or not commercially available, is the purchase a reasonably similar replacement or a minor deviation from the original (i.e., not an improvement or upgrade)?

- Is the component purchase less than 50% of the cost of replacement of the entire system?
  - YES
  - NO

- Is the work within the $1MM minor cap limit ("OP Approval required to handle as maintenance is >$1MM")?
  - YES
  - NO

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  - YES
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