Whole-Building Plumbing PM Calendar and Budget Planner

A Planning, Scheduling, and Cost-Tracking Tool for Commercial, Industrial, Medical, Retail, Restaurant, Education, Religious, Multifamily, and Venue Properties in LA County, Orange County, San Diego County, and the Inland Empire

How to Use This Toolkit

This planner turns plumbing maintenance from a series of emergency calls into a scheduled program. Use Part 1 to inventory your plumbing assets. Use Part 2 to rank them by risk. Use Part 3 to build your task schedule by interval. Use Part 4 to lay the year out month by month. Use Part 5 to log every service visit. Use Part 6 to track planned spending against reactive spending. Use Part 7 to log issues reported by staff and occupants. Use Part 8 to track compliance documents. Use Part 9 to review the year and build next year's budget. Part 10 is a quick reference.

Start with the inventory and the risk ranking. Everything else builds on them. The intervals shown are starting points only. Always apply manufacturer instructions first, then adjust for your operating conditions, such as hard water, usage volume, and what past inspections found.

This planner is a general planning tool. It does not replace manufacturer instructions, code requirements, or the judgment of a licensed plumber. Requirements vary by jurisdiction. Verify what applies to your property with your city, county, water agency, and health department.

PROPERTY INFORMATION

Field	Details
Property Name / Address	
Year Built / Major Renovations	
Number of Buildings / Floors / Units	
Water Service Area / Water Agency	
Sewer Agency	
Hard Water Conditions	☐ Yes - Inland Empire / LA Basin ☐ Moderate ☐ Soft ☐ Unknown
Primary Plumbing Service Provider	
After-Hours Emergency Contact	
Person Responsible for This Planner	
Planner Start Date / Last Full Review	
Annual Plumbing Maintenance Budget	$

PART 1: PLUMBING ASSET INVENTORY

List every major plumbing asset on the property. Add rows as needed.

System Category Key

Code	System	Typical Assets
D	Drain and sewer	Building drains, laterals, cleanouts, floor drains, grease interceptors, cleanouts
HW	Hot water	Water heaters, boilers, mixing valves, recirculation pumps, expansion tanks
V	Valves and pressure	Main shutoff, branch and zone isolation valves, pressure reducing valves, gauges
B	Backflow prevention	Reduced pressure, double check, pressure vacuum, and other assemblies
F	Fixtures and leak detection	Toilets, urinals, faucets, flush valves, supply stops, leak sensors, flow monitors, meters
E	Exterior and pumps	Roof drains, downspouts, storm inlets, sump and ejector pumps, hose bibbs, irrigation connections

Asset Inventory Log

Asset ID	System Code	Description / Location	Make / Model	Install Year	Age	Serves (Building, Area, Tenants)	Criticality	Manufacturer Service Interval	Last Service	Responsible Party
	☐ D ☐ HW ☐ V ☐ B ☐ F ☐ E						☐ High ☐ Med ☐ Low			☐ Staff ☐ Vendor
	☐ D ☐ HW ☐ V ☐ B ☐ F ☐ E						☐ High ☐ Med ☐ Low			☐ Staff ☐ Vendor

Location Reference - Critical Shutoffs and Access Points

Item	Location	Labeled	Accessible	Last Operated
Main water shutoff		☐ Yes ☐ No	☐ Yes ☐ No	
Water meter		☐ Yes ☐ No	☐ Yes ☐ No	
Water heater shutoff(s)		☐ Yes ☐ No	☐ Yes ☐ No	
Building main drain cleanout		☐ Yes ☐ No	☐ Yes ☐ No	
Sewer lateral cleanout		☐ Yes ☐ No	☐ Yes ☐ No	
Gas shutoff for water heating (if applicable)		☐ Yes ☐ No	☐ Yes ☐ No	
Irrigation shutoff		☐ Yes ☐ No	☐ Yes ☐ No	

Inventory Completeness Check

☐ Every water heater, boiler, and mixing valve listed
☐ Every shutoff, isolation valve, and pressure reducing valve located and listed
☐ Every backflow assembly listed, including irrigation, fire, kitchen, boiler, and pool connections
☐ Every grease interceptor, sump pump, and ejector pump listed where present
☐ Roof drains, storm inlets, and cleanouts located and listed
☐ Leak sensors, flow monitors, and meters listed
☐ Equipment with unknown age or model flagged for inspection

PART 2: RISK RANKING AND INTERVAL SETTING

Rank each asset by how likely it is to fail and what happens to the operation if it does. Then use the tier to set how often you inspect it.

Scoring

Score	Likelihood of Failure	Consequence of Failure
1	Low - new or well maintained, no history of problems	Low - minor inconvenience, no effect on operations
2	Moderate - aging, some history of repairs or wear	Moderate - affects part of the building or a short interruption
3	High - old, poor condition, repeated repairs, or hard-water scaling	High - closure, loss of hot water or sanitation, damage to occupied space, or compliance exposure

Risk score = likelihood x consequence

Risk Score	Tier	Interval Guidance
1 to 2	Low	Annual professional check or on condition. Staff visual checks as scheduled.
3 to 4	Medium	Standard interval from Part 3. Review after each service.
6 to 9	High	Shortest interval in Part 3, or more often. Add staff checks. Plan repair or replacement in the budget.

Examples of High-Consequence Assets by Property Type

Property Type	Typical High-Consequence Assets
Commercial office	Main shutoff, central water heater, riser valves, backflow on fire and irrigation lines
Industrial	Process water connections, floor drains and trench drains, backflow at process lines, emergency fixtures
Medical	Hot water systems, backflow on medical and lab equipment, drain lines serving clinical areas
Retail	Restroom supply and drain lines, main shutoff, water heater, floor and storm drains at entrances
Restaurant	Kitchen drain lines, grease interceptors, water heater, dishwasher connections, backflow assemblies
Education	Central hot water, restroom batteries, backflow on irrigation and kitchen lines, sump pumps
Religious	Fellowship hall kitchen and restrooms, water heater, drains serving school or childcare areas
Multifamily	Central water heaters, risers and isolation valves, main sewer lateral, pressure reducing valves
Arena / venue	Restroom drain and supply capacity, concession kitchens, sewer laterals, backflow assemblies, pump systems

Risk Ranking Log

Asset ID	Likelihood (1 to 3)	Consequence (1 to 3)	Risk Score	Tier	Basis for Score	Review Date
				☐ Low ☐ Medium ☐ High		
				☐ Low ☐ Medium ☐ High		

PART 3: MASTER TASK SCHEDULE BY SYSTEM AND INTERVAL

Intervals are starting points. Apply manufacturer instructions first, tighten intervals for High-tier assets and hard water conditions, and extend only on documented evidence. Not every task applies to every property.

Section 3A: Staff Routine Checks

Interval	System	Task	Applies To
Daily	F	Walk restrooms, kitchens, mechanical rooms, and janitor closets for leaks, running fixtures, wet spots, and odors	☐ All
Daily	D	Check floor drains and sinks for slow flow or odors. In kitchens, confirm drain screens are in place	☐ Restaurant ☐ Medical ☐ Education ☐ Venue ☐ Other
Daily	HW	Confirm water heater area is dry, no alarms or fault lights, and no unusual noises	☐ All with water heaters
Weekly	F / E	Check leak sensor status lights and sump pit conditions	☐ Where installed
Weekly	HW	Look for staining or dripping at relief valve discharge pipes	☐ All with water heaters
Weekly	V	Confirm valve boxes, cleanouts, and shutoffs are clear and accessible	☐ All
Monthly	F	Read the water meter and compare with the prior month and the same month last year	☐ All
Monthly	F	Run a meter test when water use is at a minimum: read the meter, wait an hour, read it again, and note any change	☐ All

Monthly	V	Record static water pressure at a gauge	☐ All
Monthly	E	Walk the exterior for wet areas, hose bibb leaks, irrigation leaks, and debris at roof drains and storm inlets	☐ All
Monthly	F	Test leak sensor alarms and any automatic shutoff valves	☐ Where installed

Section 3B: Professional Service Tasks

Interval	System	Task	Responsible
Quarterly	D	Clean high-use drain lines, such as kitchens and laundries	☐ Vendor
Quarterly	D	Service grease interceptors, with frequency set by accumulation and agency requirements	☐ Vendor
Quarterly	E	Test sump and ejector pumps, floats, and alarms	☐ Vendor ☐ Staff
Quarterly	HW	Check recirculation pump operation and return temperatures	☐ Vendor ☐ Staff
Semi-annual	HW	Flush water heaters to remove sediment. Hard-water properties should not extend this interval	☐ Vendor
Semi-annual	V	Exercise high-use shutoffs and confirm they stop flow	☐ Vendor ☐ Staff
Semi-annual	F	Inspect exposed piping, supports, and insulation for leaks and corrosion	☐ Vendor ☐ Staff
Annual	B	Test every backflow assembly with a certified tester. Submit reports to the water agency where required	☐ Certified tester
Annual	V	Measure pressure at each pressure reducing valve, clean strainers, and confirm outlet pressure is within range	☐ Vendor
Annual	V	Exercise every isolation and shutoff valve and confirm flow isolation. Update the valve map	☐ Vendor
Annual	HW	Inspect anode rods, test relief valves, and check burners, elements, flues, and combustion air as applicable	☐ Vendor
Annual	HW	Verify mixing valve operation and confirm delivered temperatures at representative fixtures	☐ Vendor
Annual	D	Camera inspect main drain and high-risk lines, and clean the sewer lateral as needed	☐ Vendor
Annual	F	Inspect supply stops, flush valves, faucets, flexible connectors, and fixture seals	☐ Vendor ☐ Staff
Annual	E	Clear and inspect roof drains, downspouts, and storm inlets before the rainy season	☐ Vendor ☐ Staff
Annual	E	Inspect irrigation connections and winterize or restart as the season requires	☐ Vendor ☐ Staff
Every 3 to 5 years	All	Full plumbing condition assessment and update of the risk ranking	☐ Vendor ☐ Engineer
Every 3 to 5 years	F	Replace aging supply stops and flexible connectors, and review fixtures for replacement	☐ Vendor

Section 3C: Event-Driven Checks

Trigger	Checks
After a significant storm	Walk the exterior, check roof drains and storm inlets, test sump pumps, and look for ponding and entry points
After an outage or shutdown	Confirm water heaters and pumps restart properly, check for leaks when pressure returns, and flush fixtures that sat unused
After renovation or tenant improvement	Confirm shutoffs, backflow, and drain connections are intact and documented, and update the inventory
After any leak, backup, or complaint	Identify the cause, check related assets, and log it in Part 7
Before a peak period, such as a school year, event season, holiday period, or summer	Review hot water capacity, drains, and restroom fixtures, and confirm service coverage

Before the rainy season	Clear exterior drains, test pumps, and confirm cleanouts are accessible

PART 4: 12-MONTH CALENDAR

Assign tasks from Part 3 to months. Southern California timing notes are included to help you plan. Adjust for your property.

Month	Timing Notes	Planned Tasks	Assigned To	Scheduled Date	Status
January	Rainy season in progress. Storm checks as needed				☐ Done ☐ Pending
February	Rainy season in progress. Review winter findings				☐ Done ☐ Pending
March	End of rainy season. Begin spring reset walk-through				☐ Done ☐ Pending
April	Spring reset. Complete baseline walk-through, risk ranking, and schedule. Order repairs				☐ Done ☐ Pending
May	Pre-summer service. Book high-demand service early				☐ Done ☐ Pending
June	Summer demand begins. Check hot water capacity and restroom fixtures				☐ Done ☐ Pending
July	Peak summer use. Monitor meter and pressure				☐ Done ☐ Pending
August	Peak summer use. Mid-year budget review				☐ Done ☐ Pending
September	Back-to-school and event season. Backflow testing window. Prepare for the rainy season				☐ Done ☐ Pending
October	Rainy season preparation. Clear roof drains, storm inlets, and pump pits				☐ Done ☐ Pending
November	Rainy season begins. Holiday demand. Confirm emergency contacts				☐ Done ☐ Pending
December	Year-end review of logs and costs. Begin next year's budget				☐ Done ☐ Pending

PART 5: COMBINED SERVICE LOG

Record every plumbing service visit, planned or reactive, so costs and conditions can be compared across the year.

Date	Asset ID	System	Visit Type	Provider / Technician	Work Performed	Findings and Readings	Parts Replaced	Follow-Up Needed	Follow-Up Done	Cost
		☐ D ☐ HW ☐ V ☐ B ☐ F ☐ E	☐ Planned ☐ Reactive ☐ Emergency					☐ Yes ☐ No	☐ Yes ☐ No	$
		☐ D ☐ HW ☐ V ☐ B ☐ F ☐ E	☐ Planned ☐ Reactive ☐ Emergency					☐ Yes ☐ No	☐ Yes ☐ No	$

Trend Tracking for Key Readings

Track readings that change slowly over time. A reading that moves in one direction across several visits is an early warning.

Asset ID	Reading Type	Year 1	Year 2	Year 3	Trend	Action
	☐ Static pressure ☐ Sediment level ☐ Anode rod condition ☐ Valve operating effort ☐ Delivered hot water temp ☐ Interceptor accumulation				☐ Stable ☐ Worsening	
	☐ Static pressure ☐ Sediment level ☐ Anode rod condition ☐ Valve operating effort ☐ Delivered hot water temp ☐ Interceptor accumulation				☐ Stable ☐ Worsening	
	☐ Static pressure ☐ Sediment level ☐ Anode rod condition ☐ Valve operating effort ☐ Delivered hot water temp ☐ Interceptor accumulation				☐ Stable ☐ Worsening	
	☐ Static pressure ☐ Sediment level ☐ Anode rod condition ☐ Valve operating effort ☐ Delivered hot water temp ☐ Interceptor accumulation				☐ Stable ☐ Worsening	

Service Report Minimum Standard

A report that says "serviced, working normally" is not enough. Before accepting a service visit as complete, confirm the report includes:

☐ Date, technician name, and license number where applicable
☐ Asset identified by location and ID
☐ Specific tasks performed
☐ Actual readings, such as pressure, temperature, and test results, not just pass or fail
☐ Condition found before work and after work
☐ Parts replaced
☐ Any recommended follow-up with a suggested timeline

PART 6: PLANNED VERSUS REACTIVE COST TRACKER

This section shows what the program is worth. Record planned maintenance spending and reactive repair spending separately for each system, along with the indirect costs of failures.

Section 6A: Planned Maintenance Spending by System

System	Q1	Q2	Q3	Q4	Annual Total
D - Drain and sewer	$	$	$	$	$
HW - Hot water	$	$	$	$	$
V - Valves and pressure	$	$	$	$	$
B - Backflow prevention	$	$	$	$	$
F - Fixtures and leak detection	$	$	$	$	$
E - Exterior and pumps	$	$	$	$	$
Total planned	**$**	**$**	**$**	**$**	**$**

Section 6B: Reactive and Emergency Spending by System

System	Q1	Q2	Q3	Q4	Annual Total
D - Drain and sewer	$	$	$	$	$
HW - Hot water	$	$	$	$	$
V - Valves and pressure	$	$	$	$	$
B - Backflow prevention	$	$	$	$	$
F - Fixtures and leak detection	$	$	$	$	$
E - Exterior and pumps	$	$	$	$	$
Total reactive	**$**	**$**	**$**	**$**	**$**

Section 6C: Reactive Incident Cost Detail

Include the indirect costs. They are often larger than the repair itself.

Date	Asset ID	Incident	Emergency Labor and Dispatch	Parts	Water Damage Repair and Cleanup	Hours Offline	Lost Revenue, Credits, or Concessions	Staff Time	Other	Total Cost
			$	$	$		$	$	$	$
			$	$	$		$	$	$	$

Section 6D: Annual Summary

Metric	This Year	Prior Year	Change
Total planned maintenance spending	$	$	$
Total reactive and emergency spending (Section 6B)	$	$	$
Indirect costs of failures (Section 6C, columns beyond repair)	$	$	$
Total plumbing cost	$	$	$
Reactive share of total spending	%	%	
Number of emergency calls			
Average cost per emergency call	$	$	$
Hours of downtime or lost use			
Water use (gallons or billing units)			
Budget versus actual	$	$	$

Reactive share = reactive spending divided by total spending. A falling reactive share over time shows the program is working.

Program Value Estimate

Step	Amount
Baseline reactive and indirect failure costs, prior year	$
Current year reactive and indirect failure costs	$
Reduction in reactive costs	$
Increase in planned maintenance spending	$
Net value of program (reduction minus increase)	**$**

A single year may be noisy. Review the trend across two or three years before drawing conclusions.

PART 7: ISSUE REPORT LOG (STAFF AND OCCUPANTS)

Log every leak, slow drain, odor, temperature complaint, and pressure complaint reported by staff, tenants, residents, students, or guests. Patterns here show where the program needs attention.

Date	Reported By	Location	Issue	System	Urgency	Response Date	Resolution	Follow-Up Needed
			☐ Leak ☐ Slow drain ☐ Odor ☐ No hot water ☐ Low pressure ☐ Running fixture ☐ Other	☐ D ☐ HW ☐ V ☐ B ☐ F ☐ E	☐ Urgent ☐ Routine			☐ Yes ☐ No
			☐ Leak ☐ Slow drain ☐ Odor ☐ No hot water ☐ Low pressure ☐ Running fixture ☐ Other	☐ D ☐ HW ☐ V ☐ B ☐ F ☐ E	☐ Urgent ☐ Routine			☐ Yes ☐ No

Pattern Flags - Escalate When:

☐ The same location is reported twice within 90 days
☐ The same issue type appears across several locations
☐ Reports about hot water or pressure cluster at the same time of day
☐ A report has gone unanswered for more than the target response time
☐ Reports increase after a renovation, outage, or storm

Reporting Culture Checklist

☐ Staff and occupants know how to report an issue and whom to contact
☐ Reporting instructions are posted in restrooms, kitchens, and common areas
☐ Urgent reports receive a response the same day
☐ Reporters are told when the issue is resolved

PART 8: COMPLIANCE AND DOCUMENT TRACKER

Record where each document lives and when it is next due. Requirements vary by property type and jurisdiction.

Document / Requirement	Applies To	Authority / Source	Last Completed	Next Due	Location of Record	Status
Backflow assembly test reports	☐ All with assemblies	Water agency				☐ Current ☐ Due ☐ Overdue
Grease interceptor service records and manifests	☐ Restaurant ☐ Food service	Sewer agency / health department				☐ Current ☐ Due ☐ Overdue
Industrial wastewater or FOG permit	☐ Food service ☐ Industrial	Sewer agency				☐ Current ☐ Due ☐ Overdue
Water heater service records	☐ All	Warranty / code / insurer				☐ Current ☐ Due ☐ Overdue
Relief valve test records	☐ All with water heaters	Manufacturer / code				☐ Current ☐ Due ☐ Overdue
Hot water temperature records	☐ Restaurant ☐ Medical ☐ Multifamily ☐ Education ☐ Other	Health department / code				☐ Current ☐ Due ☐ Overdue
Pressure readings	☐ All	Code / insurer				☐ Current ☐ Due ☐ Overdue
Camera inspection recordings	☐ All	Internal				☐ Current ☐ Due ☐ Overdue
Equipment warranties	☐ All	Manufacturer				☐ Current ☐ Due ☐ Overdue
Insurance policy and water damage coverage review	☐ All	Insurer / broker				☐ Current ☐ Due ☐ Overdue
Habitability or complaint response records	☐ Multifamily	Local requirements				☐ Current ☐ Due ☐ Overdue

Documentation Retention

Document	Suggested Minimum Retention
Service logs and reports	5 years
Backflow test reports	5 years
Interceptor service records and manifests	3 to 5 years, or per agency requirement
Camera inspection recordings	Life of the asset plus 5 years
Incident and cost records	5 years, longer if litigation is possible
Warranties and installation records	Life of the equipment
Issue report log	3 to 5 years

PART 9: ANNUAL REVIEW AND NEXT-YEAR BUDGET BUILDER

Annual Review Checklist

☐ Inventory updated for additions, removals, and replacements
☐ Risk ranking reviewed and tiers updated
☐ All scheduled tasks in Part 3 confirmed complete, or reasons for gaps documented
☐ Service log reviewed for repeat problems and worsening trends
☐ Issue report log reviewed for patterns
☐ Planned and reactive costs totaled and compared with the prior year
☐ Compliance documents confirmed current
☐ Service provider performance reviewed for responsiveness and quality of documentation
☐ Intervals adjusted based on what the year showed
☐ Staff and occupant reporting process reviewed

Next-Year Budget Builder

System	Planned Maintenance	Known Repairs	Replacements / Capital Items	Contingency	Total
D - Drain and sewer	$	$	$	$	$
HW - Hot water	$	$	$	$	$
V - Valves and pressure	$	$	$	$	$
B - Backflow prevention	$	$	$	$	$
F - Fixtures and leak detection	$	$	$	$	$
E - Exterior and pumps	$	$	$	$	$
Total	**$**	**$**	**$**	**$**	**$**

Set contingency based on your reactive spending history. A shrinking contingency over time is a sign the program is working.

Replacement Outlook

Asset ID	Age	Condition	Expected Replacement Window	Estimated Cost	Budget Year	Notes
		☐ Good ☐ Fair ☐ Poor		$		
		☐ Good ☐ Fair ☐ Poor		$		
		☐ Good ☐ Fair ☐ Poor		$		
		☐ Good ☐ Fair ☐ Poor		$		

PART 10: QUICK REFERENCE

Warning Signs by System

System	Warning Sign	Suggested Action
Drain and sewer	Slow drains, gurgling, repeated clogs, sewage odor	Log it, schedule cleaning and camera inspection. Call promptly if a backup occurs
Drain and sewer	Grease or oily film in floor drain water	Check interceptor service status. Schedule service
Hot water	Rumbling, popping, rusty water, or inconsistent temperature	Schedule service. Do not defer
Hot water	Water at fixtures too hot or too cool compared with the setpoint	Check mixing valve and delivered temperatures. Call a plumber
Hot water	Relief valve dripping continuously	Call immediately. Do not cap the valve
Valves and pressure	Valve difficult to turn, does not fully close, or leaks at the stem	Plan repair or replacement before an emergency
Valves and pressure	Water hammer, noisy pipes, or pressure over 80 psi	Check the pressure reducing valve
Backflow	Relief valve discharging from an assembly	Call for service promptly
Backflow	Test overdue or report not submitted	Schedule the test and confirm agency requirements
Fixtures and leaks	Meter moving when water use is off	Search for a hidden leak and call a plumber
Fixtures and leaks	Running toilet or dripping faucet	Repair promptly
Exterior and pumps	Standing water after rain, pump running continuously, or alarm sounding	Inspect and call for service

When to Call a Professional Immediately

☐ Water is entering occupied space or contacting electrical equipment
☐ Sewage is backing up into a building
☐ No hot water in a multifamily, medical, restaurant, or education property
☐ A relief valve is discharging heavily
☐ A shutoff valve will not close during an active leak
☐ The meter shows continuous flow and the source is not found

Emergency Information - Fill In and Post

Item	Details
Main water shutoff location	
Emergency plumbing contact	
After-hours number	
Water agency emergency number	
Insurance carrier claims line	
Property manager or owner contact	