

# Division of Facilities Planning and Management

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## Facilities, Planning and Management

### Operational Overview

**Tadashi Nakadegawa, Director**

**May 6, 2009**



## FACILITIES PLANNING AND MANAGEMENT DEPARTMENT OVERVIEW

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The District has 110 K-12 school sites with facilities totaling approximately 4.8 million square feet. An additional .7 million square feet in CDC's, Adult Education and Administration Buildings for a combined total of approximately 5.5 million square ft.

The Department of Facilities Planning and Management provides new and improved school facilities throughout the District in accordance with the updated Facilities Master Plan. The primary funding source is the GOB Fund.

### **Services:**

- **Renovate and modernized existing facilities**
- **Maintain Design Standards**
- **Maintain and improve on OUSD specifications (CHPS, Energy Efficiency)**
- **Provide space for new programs per the Facilities Master Plan**
- **Manage District Capital Program**
- **Manage Capital Program Citizens Oversight Committee**



## LIST OF PROJECTS COMPLETED TO DATE

Bret Harte Modernization	03025	Closeout
Calvin Simmons Modernization	03035	Closeout
Carter Modernization	03026	Closeout
Cleveland Mod	03039	Closeout
Cole Intercom/PA Upgrades	07014	Closeout
Cox CDC Portable Installation	03049-2	Closeout
Cox Interim Housing	03049-5	Closeout
Cox New Building	03049-4	Contracts
Cox Modernization	03027	Contracts
Cox Portables-Ph 1	03049-1	Closeout
Cox Portables-Ph 2	03049-3	Closeout
Elmhurst Modernization - Phase 1Roof	06003-1	Closeout
Facilities Ops		Ongoing
Far West Intercom/PA Upgrades	07015	Closeout

Fire Alarm Repairs		Ongoing
Havenscourt Modernization	03042	Closeout
Highland Interim Housing	07018	Closeout
Hoover Modernization	03031	Closeout
Horace Mann		Closeout
Lafayette Intercom/PA Upgrades	07016	Closeout
Laurel Modernization	03038	Closeout
Manzanita Modernization Ph 1-3	03032-3	Closeout
Manzanita Small Schools	04027	Closeout
McClymonds Culinary Kitchen	03044	DSA Only
McClymonds Intercom/PA Upgrades	07017	Closeout
Oakland High HVAC (Williams)	07012	Closeout
Peralta Modernization	03040	Closeout
Playground Inspections	07038	Construction
Stonehurst Small Schools - Portables	06011	Contracts
Westlake Modernization- Increment II	03036-2	Closeout
Whittier Modernization	03041	Closeout
<b>CLOSEOUT/CONST/CONTRACTS</b>		



## LIST OF PROJECTS IN PROGRESS AND ANTICIPATED

Arroyo Viejo CDC Replacement	07024	Pre-Design
Downtown Development	07047	Pre-Design
Elmhurst Modernization	06003-3	Pre-Design
Havenscourt New Clsrm Bldg/Cafeteria	07030	Pre-Design
Highland New Classroom	06009	Pre-Design
Hintil KUU CDC Bldg Replacement	07028	Pre-Design
Laurel CDC Bldg Replacement	07027	Pre-Design
Parker CDC Bldg Replacement	07026	Pre-Design
Stonehurst CDC Bldg Replacement	07025	Pre-Design

Calvin Simmons Health Center	7001	Design
Cole Health Center	07004	DSA
Cole Modernization	06018	DSA
Cox Modernization	03027	On Hold
Downtown		Design A & C
	07047	Design B
		Design DF & 35
Elmhurst Auditorium/FA Modernization	06003-2	Design
Fremont Federation	05015	Design
Jefferson New Bldg	06002	Design
Lazear Modernization	03033	Design
Madison Health Center	07002	Design
Manzanita Modernization Phase 2	03032-3	Design
Montera Fire Alarm	7020	Design
Montera Modernization	3034	Design
Oakland HS Health Clinic	06032	Design
Oakland HS Modernization	05016	Design
Prescott Modernization	06010	Design
Ralph Bunche Gym, ADA & FA- Ph3	03028	Design/DSA
Roosevelt Health Center	07005	Design
Stonehurst Restroom Renovations	07045	Design
UPA Multi-Purpose Bldg	06017	DSA

Madison Fence/Wall		Pre-Design
Highland New Buldg		Pre-Design
Whittier New Classroom	07052	Pre-Design
Playground Inspection Repairs	07038	Pre-Design
Life (Red Cross Retro/Add)		Pre-Design
Elmhurst Mod/Add		Pre-Design



## FACILITIES PROGRAM SEISMIC NEEDS BASED ON NEW SEISMIC STANDARDS

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All of our K-12 Facilities were built under the authority of DSA and were designed and built to be seismically adequate for that period. There have been several updates to the California Seismic Code since that time. The OPSC modernization program has not funded structural upgrades to our facilities and we have not yet embarked on locally funded seismic upgrade program.

There would be a minimum need of approximately **\$ 275** million to upgrade K-12 facilities to 2002, seismic standards without escalation. Adding an escalation of 6% per year for a period of 7 years would result on a current total need of **\$ 390.5** dollars.

The cost of \$50 per square feet is based on data published in the SEISMIC SAFETY INVENTORY OF CALIFORNIA PUBLIC SCHOOLS AB300, Prepared by the Department of General Services (November 15, 2002) 5.5 million x \$50/sq. ft. = \$275 million

***Note: A Seismic Evaluation and Budget Estimate would be required in order to approximate the total cost based on the most current 2007 seismic code.***



## 2005-2006 LONG RANGE MASTER PLAN TOTAL NEEDS

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The Long Range Master Plan identified a need of **\$ 900** million to improve sites and building conditions.

Completed to Date Approximately	\$150,000 million
Projects in progress	\$150,000 million
Planned projects 2010-2013	<u>\$300,000 million</u>
Total Estimated to be completed	\$ 600,000 million

That leaves \$300 million in unidentified projects with a total need of approximately \$900 million including escalation cost and seismic needs.

In general the figure addressed issues such as:

- a. ADA compliance
- b. Roof systems
- c. Electrical systems and upgrades
  1. Fire and intrusion alarms
  2. Data system
- d. Painting
- e. Mechanical systems
- f. Finishes



# SUMMARY CAPITAL PROJECTED REVENUES AND EXPEDITURES FY 2006-2013

## FY 2006 – 2008 FIGURES INCLUDED ARE ACTUALS

## FY2009 -2013 FIGURES INCLUDED ARE PROJECTIONS

FACILITIES FUNDS									
	<i>RESOURCE 9099 PROGRAM 9303 BUIDING FUND MEASURE A/C 21-22</i>	<i>RESOURCE 9199 PROGRAM 9901 BUIDING FUND MEASURE B 21-22</i>	<i>STATE SCHOOL BUILDING FUNDING 30-30</i>	<i>CAPITAL FACILITIES (DEVELOPER FEES) 25-25</i>	<i>SALE OF SITES 40-40</i>	<i>SPECIAL RESERVE FUNDS 17-17</i>	<i>COUNTY SCHOOL FACILITIES FUND 35- 35</i>	<i>GENERAL FUND 01-01</i>	<i>TOTAL FACILITIES</i>
<i>SUMMARY</i>									
<b>BEGINNING FUND BALANCE FY 0607</b>	77,425,898.17	751,216.11	3,947,673.16	8,417,383.57	114,919.47	-	7,423,019.57	1,156.00	98,081,266.05
<b>REVENUES:</b>									
<i>2006-2007</i>	<i>1,716,719.19</i>	<i>133,192,723.81</i>	<i>177,311.38</i>	<i>5,476,431.58</i>	<i>17,906.35</i>	<i>-</i>	<i>1,453,722.95</i>	<i>-</i>	<i>142,034,815.26</i>
<i>2007-2008</i>	<i>2,001,576.98</i>	<i>5,135,861.00</i>	<i>191,984.11</i>	<i>5,771,071.64</i>	<i>5,740.48</i>	<i>-</i>	<i>3,815,461.27</i>	<i>-</i>	<i>16,921,695.48</i>
<i>2008-2009</i>	<i>1,700,000.00</i>	<i>2,700,000.00</i>	<i>130,000.00</i>	<i>3,200,000.00</i>	<i>4,746,727.00</i>	<i>-</i>	<i>312,000.00</i>	<i>-</i>	<i>12,788,727.00</i>
<i>2009-2010</i>	<i>1,700,000.00</i>	<i>187,700,000.00</i>	<i>130,000.00</i>	<i>3,200,000.00</i>	<i>-</i>	<i>-</i>	<i>312,000.00</i>	<i>-</i>	<i>193,042,000.00</i>
<i>2010-2013</i>	<i>1,700,000.00</i>	<i>122,700,000.00</i>	<i>130,000.00</i>	<i>3,200,000.00</i>	<i>-</i>	<i>-</i>	<i>312,000.00</i>	<i>-</i>	<i>128,042,000.00</i>
<b>TOTAL REVENUES</b>	8,818,296.17	451,428,584.81	759,295.49	20,847,503.22	4,770,373.83	-	6,205,184.22	-	492,829,237.74
<b>EXPENDITURES:</b>									
<i>2006-2007</i>	<i>(36,256,257.62)</i>	<i>(4,194,600.52)</i>	<i>-</i>	<i>(6,334,722.33)</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>(46,785,580.47)</i>
<i>2007-2008</i>	<i>(12,456,490.93)</i>	<i>(39,952,506.81)</i>	<i>(43,828.53)</i>	<i>(3,940,082.11)</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>(56,392,908.38)</i>
<i>2008-2009</i>	<i>(32,017,524.06)</i>	<i>(87,553,839.93)</i>	<i>(3,087,000.00)</i>	<i>(13,529,831.00)</i>	<i>-</i>	<i>-</i>	<i>(8,000,000.00)</i>	<i>-</i>	<i>(144,188,194.99)</i>
<i>2009-2010</i>	<i>(20,514,810.12)</i>	<i>(153,492,836.18)</i>	<i>(329,500.00)</i>	<i>(1,807,817.00)</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>(176,144,963.30)</i>
<i>2010-2013</i>	<i>(49,354,697.88)</i>	<i>(96,616,462.91)</i>	<i>(87,000.00)</i>	<i>(1,807,817.00)</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>(147,865,977.79)</i>
<b>TOTAL EXPENDITURES</b>	(150,599,780.61)	(381,810,246.35)	(3,547,328.53)	(27,420,269.44)	-	-	(8,000,000.00)	-	(571,377,624.93)
<b>ENDING BALANCE FY 2013</b>	(64,355,586.27)	70,369,554.57	1,159,640.12	1,844,617.35	4,885,293.30	-	5,628,203.79	1,156.00	19,532,878.86
<b>* COLOR IN THE CELLS REPRESENT PROJECTIONS OF REVENUES AND EXPENDITURES</b>					<b>A DRAW IS REQUIRED FOR THE FOLLOWING YEARS:</b>				
* FY 2010-2013 THE YEARS HAVE BEEN COMPRESSED INTO ONE LINE ITEM					* 185 MILLION FY 2009-2010				
* FY 2010-2013 REVENUE IS NOT INCLUDED IN THE EQUATION					* 120 MILLION FY 2011-2013				



# STATE FUNDING PROJECTED REVENUES:

In order to maximize local resources, Oakland USD has been aggressive in pursuing matching grant programs, particularly State programs. The following table lists types of modernization and new construction.

- **OPSC – Office of Public School Construction**
  - **Williams Settlement - Emergency Repair Program (ERP)**
    - Grants received to date \$4,985,299.85
    - Collecting Data in order to submit applications \$17,463,446.12
  - **Overcrowding Relief Grant Projects**
  - **Modernization Projects**
  - **Totals**

<u>STATE GRANTS</u>	
\$	17,463,446.12
\$	4,514,732.00
\$	36,174,327.00
\$	58,152,505.12





# FACILITES UTILIZATION ANALYSIS OF REVENUES ASSOCIATED WITH OUSD LOADING STANDARDS VS OTHER SCHOOL DISTRICT STANDARDS

District	K-3	4-5	6-12	Flex	Parent	SDC	Optimum Size		
							Elementary	Middle	High
OUSD	20	25	25.5	1-4	1	1/12			

WCCUSD	20	32	32				450	900	1200
Chico	20	33	35		0		750	1200	1800
South Pasadena	20	32	32	0	0				
Adelanto	25	30	35	0	1	1/12	500	1000	
San Ysidro					1				
Santa Ana	20	31	32.5		0		360	1160	

**AVERAGE** **33.3**

<b>EXAMPLE: MIDDLE SCHOOL, REVENUE COMPARISON AS A RESULT OF LOADING STANDARD</b>							
	TOTAL CLASSROOMS AVAILABLE	LOADING STANDARD	SITE STUDENT CAPACITY	ACTUAL ENROLLMENT	ADA FUNDING PER STUDENT	TOTAL FUNDING	
OAKLAND USD ACTUAL ENROLLMENT	<b>28</b>			270	\$ 9,094.00	\$2,455,380.00	
OKLAND USD CURRRENT LOADING STANDARD	28	25	700		\$ 9,094.00	\$6,365,800.00	
AVERAGE OF OTHER SCHOOL DISTRICTS LOADING STANDARD	28	33.3	932.4		\$ 9,094.00	\$8,479,245.60	

**LOST REVENUE: OUSD LOADING STANDARDS VS. OUSD ACTUAL ENROLLMENT** **\$3,910,420.00**  
**LOST REVENUE: OTHER DISTRICTS LOADING STANDARDS VS. OUSD LOADING STANDARDS** **\$2,113,445.60**



# OUSD Local Business Policy

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## Key Issues:

**District's lack of Local Business Program Contributed to Low Local and Small Business Participation.**

**Disproportionate Volume of Local Tax Dollars Exported Outside of Oakland.**

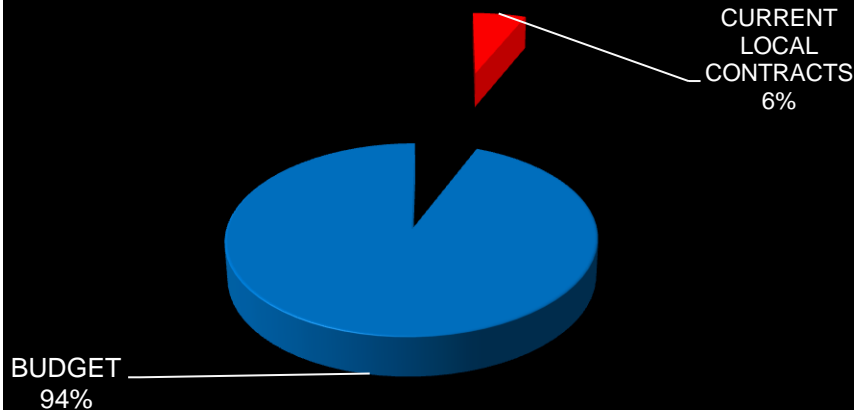
**Low Local Business Utilization- Monies Used from Local Property Tax does not Promote Equitable Distribution of Funds into Local Community**



# Current Utilization/Target Utilization Goals

- 20% minimum participation on all construction contracts above \$15,000 and professional service contracts over \$72,400 Additional Bid Incentives/Increased participation
- Joint Venture Opportunities for SLBE and SLRBE
- Mentor Protégé Business Opportunities

## PRVIOUS UTILIZATION



## TARGET UTILIZATION GOALS



# CHPS – Construction of High Performance(Green)Schools

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OUSD Board Policy supports implementing sustainability initiatives such as: improved recycling, green cleaning, environmentally preferable purchasing, and energy & water efficiency, including the design and construction of high performance (CHPS) schools in all its new construction, modernizations and new additions, as well as operations and maintenance such that our facilities are:

- Healthy
- Naturally Daylit
- Thermally, visually and acoustically comfortable
- Efficient use of energy, materials and water
- Easy to maintain and operate, *and* Commissioned
- Environmentally responsible
- A teaching tool
- Safe and secure
- A community resource
- = Sustainable



# CHPS Projects– Update + Incentive Funding

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- As of March 2009, the Facilities Division has submitted two projects to the DGS/High Performance Incentive (HPI) Grant program, Chabot Elementary and Cox Elementary modernization projects.
- Each project was fully reviewed by DSA's High Performance Schools Section, and garnered between 40.5 - 42 points, amongst the State's highest scoring HPI projects including both new construction and modernizations/new additions.
- Together these **two projects are projected to earn \$ 62,742 in additional HPI incentive grant funding** from the State.
- If the District's 5-6 other major projects qualified for OPSC Modernization funding each achieve similar 41 CHPS points, OUSD could expect **approximately \$ 634,049 in additional High Performance Incentive Grant funding** from the State!
- Recently the Division supported a grant application for free Technical Assistance from DOE to create a Solar Master Plan, and other template documents in partnership with Berkeley Unified, West Contra Costa Unified, KyotoUSA, and MIG, Inc. under the Solar America Showcase Initiative.



# Energy and Water Conservation Plan

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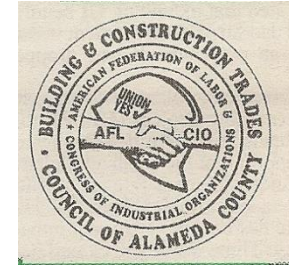
## **Steps the District is taking**

- Integrated energy audits through PG&E
- Energy Efficiency Building Retrofits
- Energy Efficiency Trainings
- Energy awareness section in Facilities newsletter
- Encouraging energy conservation, energy efficiency, load management & demand responsive to reduce environmental impacts associated with energy use

## **Status**

- We have completed energy efficiency audits on the schools identified as the highest energy users
- We have implemented the PG&E recommendations making these schools more energy efficient
- 5 new audits were completed in October for sites with high energy usage
- 8 additional sites scheduled for audits in 2009





# Oakland Unified School District

## Project Labor Agreement Progress and Strategy

2009



## Goals for Overall Local Hiring

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- Raise the local participation to 35% by December 2010, working with the Social Justice Committee and contractors
- Raise the local participation to 40% by December 2011, working with the Social Justice Committee and contractors





## Goals for Apprenticeship Hiring

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- Raise the local apprenticeship participation to 10% by December 2009, working with the Academies, the Building Trades, Social Justice Committee and contractors. Approximately 67% of total apprenticeship, assuming that the overall total remains at 15%
- Raise the local apprenticeship participation to 15% by December 2010, working with the Academies, the Building Trades, Social Justice Committee and contractors. This would be 100% of total apprenticeship, assuming that the overall total remains at 15%



# Estimated Wages Earned by Oakland Residents

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## Top 5 trades

	Journeyman	Apprentices
• Electricians	\$1,345,896	\$ 205,307
• Laborers	\$ 981,676	\$ 46,187
• Carpenters	\$ 899,904	\$ 227,951
• Painters	\$ 364,532	\$ 54,520
• Plumbers/ Steamfitters	\$ 332,831	\$ 54,533



# Division of Facilities Planning and Management

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## **Buildings & Grounds Operational Overview**

**Leroy Stokes, Director**

**May 6, 2009**



## Mission Statement

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**The purpose of the Buildings & Grounds Department is to ensure a safe, efficient, well-maintained and secure environment to facilitate the ease in which our teachers and staff can provide the best academic education to our students.**



# Agenda / Discussion Topics

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- Departmental Overview
- Craftspeople
- Understaffed Shops/Departmental Needs
- Budget
- Preventative Maintenance Program
- Williams Settlement
- Deferred Maintenance
- I.F.A.S. Work Order System
- Vandalism/Graffiti
- District Water & Energy Conservation



# Departmental Overview

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- **Carpentry** -Provide minor modernization/floor-ceiling tiling/repair & replacement of ramps/cabinetry/repair wall systems/repair & install windows
- **Roofing** -Provide minor repairs & clean gutters
- **Sheet metal** -Repair restroom partitions/fabricate window guards/fabricate gutters
- **Glazier** -Repair & install glass
- **Locksmith** -Repair & install all locks
- **Electrical** -Repair all electrical lines/install ballast/replace electrical panels
- **Alarm** -Install & repair intrusion alarms/fire alarms/testing/routine inspection
- **Grounds** -Maintain school property lawns & irrigation/monitor maintenance tree-cutting & brush removal to prevent fire hazards
- **Skilled Labor** -Assist plumbers, electricians & carpenters w/manual labor/operate heavy machinery
- **Painting** -Provide interior/exterior painting/graffiti abatement/fabricate & install signage



## Department Overview Cont.

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- **Steamfitter** -Monitor boiler rooms/repair HVAC/routing inspections
- **Vehicle Maintenance** -Service all district vehicles/minor repairs/annual vehicle inspections
- **Plumbing** -Service restroom facilities & main sewer lines
- **Elevator Maintenance** -Provide annual inspection & servicing of all elevators and wheelchair lifts
- B&G offers a **Preventative Maintenance** team of craftsmen that provide preventative measures for the individual schools sites.
- B& G also offers **after-hours** emergency services for school sites.
- B&G provides **deferred maintenance/improvement services** to all sites



# Buildings & Grounds Craftspeople

Craft	Current Employees	Frozen Vacancies
Carpenters	11	2
Electricians	12	2
Equipment Operator	1	
Gardener	11	1
Glazier	2	
Locksmith	4	
Painter	9	1
Plumber	6	1
Roofer	3	
Sheet metal Worker	3	
Skilled Laborer	6	
Steamfitter	3	2
Vehicle Maintenance	2	
Lead Carpenter	2	
Lead Electrician	2	
Lead Gardener	1	
Lead Plumber/Irrigation	1	
Lead Steamfitter	1	
<b>Total</b>	<b>80</b>	<b>9 (10% of total craftspeople)</b>

## Preventative Maintenance Team

Carpenter	2
Electrician	2
Painter	2

## Williams Team

Craft	Current	HR (on-boarding)
Carpenter	1	1
Electrician	1	1
Painter	1	1
Plumber	2	

## Total Current Employees

<b>Administrative</b>	<b>14</b>
<b>Craftspeople</b>	<b>91</b>
<b>Total Employees</b>	<b>105</b>





# Understaffed Shops/Additional Departmental Needs

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- 10% cut of current staffed craftspeople (9 frozen vacancies)
- Lack of steamfitters to take care of heat issues throughout District
- Additional Locksmiths needed
- Not enough Alarm Technicians to cover District needs
- Guard Patrol necessary to help secure sites during off-hours (11pm-6am)



## Buildings and Grounds Dept. Budget comparison worksheet 2008-09 & 2009-10

Description	2008-09	2009-10	Diff.	Note
	Revised Budget	Projection (expenditures)		
	A	B	C = B - A	
<b>RRMA (GP)- as of 3/25/2009</b>				
<i>Labor</i> Salaries & benefits	7,365,367.10	7,315,367.10	(50,000.00)	reduce \$50K for OT
Non-labor Materials & services	3,320,148.16	1,470,148.16	(1,850,000.00)	<b>After cut \$1.9M</b>
<b>RRMA (GP) TOTAL:</b>	<b>\$10,685,515.26</b>	<b>\$8,785,515.26</b>	<b>(1,900,000.00)</b>	
Unrestricted GP (grounds, security, vehicle maintenance, others)				
<i>Labor</i> Salaries & benefits	1,066,249.66	1,035,180.47	(31,069.19)	RBB 3/10/09
Non-labor Materials & services	333,750.34	294,819.53	(38,930.81)	RBB 3/10/09
<b>* Unrestricted GP (grounds, security, vehicle maintenance, others) TOTAL:</b>	<b>\$1,400,000.00</b>	<b>\$1,330,000.00</b>	<b>(70,000.00)</b>	
Preventative Maintenance (PM)				
<i>Labor</i> Salaries & benefits	417,109.39	417,109.39	0.00	
Non-labor Materials & services	76,114.95	76,114.95	0.00	
<b>Preventative Maintenance (PM) TOTAL:</b>	<b>\$493,224.34</b>	<b>\$493,224.34</b>	<b>0.00</b>	Org key 988-9184-8-01
Williams Task Force				
<i>Labor</i> Salaries & benefits	518,899.00	518,899.00	0.00	
Non-labor Materials & services	100,000.00	\$100,000.00	0.00	
<b>Williams Task Force TOTAL:</b>	<b>\$618,899.00</b>	<b>\$618,899.00</b>	<b>0.00</b>	Org key 988-9153-8-40
<b>Deferred Maintenance</b>				
Projects only	<b>\$8,580,962.73</b>	<b>\$7,615,988.00</b>	<b>(964,974.73)</b>	Five year plans ( 3rd year,2009-10)

- \* Grounds ( gardener shop)
- \* Security (call out, alarm monitoring, supplies)
- \* Vehicle maintenance ( salaries & benefits only)
- \* others (elevator, fire prevention, tree removal, landscaping, pool supplies, conference )



# Preventative Maintenance Program

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Site-focused team of 6 craftspeople (2 painters, 2 carpenters, 2 electricians) who visit each school site annually to address their maintenance issues such as:

- Check and change mechanical filters as needed
  - Replace burned out light bulbs and bad ballasts
  - Replace damaged and missing floor and ceiling tiles
  - Lubricate and adjust door hardware
  - Adjust ramps and handrails
  - Clean roof gutters
  - Touch up painting in hallways, doors, etc
  - Graffiti abatement
  - Check operation of windows, assure windows secured when opened
- 
- While at each site PM Team addresses the current online work orders
  - PM Program has assisted in decreasing department's overall work requests
  - A lead person visits each site prior to scheduled date. While on site if other issues are observed the crew compiles them in a database to be addressed at a later date.



# Preventative Maintenance Testimonials

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- **This email is in reference to the work performed on our site during the last B&G school maintenance visit. The staff was extremely helpful and courteous. The work was done quickly and with little or no interruption. If there was a question from the staff on location or preference, the B&G staff exhibited complete professionalism in their explanation and reasoning. We appreciate the B&G staff taking the time to come to Dewey and perform the repairs on the cabinets, walls, and doors and all other repairs made as well as retouching and painting in different areas on the site. We are pleased with the outcome of the project. And we look forward to another visit next year.**  
**Dewey Academy**
- **This note is to commend the P.M. Crew for their diligence and the excellent work they do for Far West H.S. We are always so appreciative and amazed at how well they take care of us and how quickly they respond to our requests. Please let them know how grateful we are for their excellent service.**  
**Far West High School**
- **On its recent visit to Lincoln, early March 2008, the Preventative Maintenance was efficient and accommodating. They were flexible with requests and very supportive in fixing our school. Thank you so much for having them come to visit.**  
**Lincoln Elementary**



# Williams Team

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- **Site inspections are performed by County Inspector**
- **Spreadsheet of findings given to Facilities detailing items needing correction**
- **Facilities sends to B&G Coordinator, who separates by Craft & Custodial Services**
- **Each shop creates a work order for the individual tasks**
- **Time, Material (invoices), total job is recorded on a spreadsheet along with other documents and pictures with correction and correction date**
- **All documents returned to Facilities for possible reimbursement**
- **Facilities sends completed documents to State**
- **Additional \$4M received to fund Williams'**



# Williams' Sites Completed to Date

Allendale - 101  
 Brookfield Village - 103  
 Burbank -  
 Carter - 214  
 Castlemont – 346,347,348  
 Claremont - 201  
 Cole - 109  
 Cox - 110  
 Edna Brewer - 210  
 Elmhurst - 202  
 Emerson - 115  
 Foster  
 Fremont – 339,340,342,343 Lowell - 209  
 Frick - 203  
 Garfield - 118  
 Golden Gate  
 Havenscourt - 207  
 Hawthorne - 124  
 Highland - 126

Hoover - 170  
 Horace Mann - 136  
 International Community  
 Jefferson - 128  
 King Estates  
 La Escuelita - 121  
 Lafayette - 129  
 Lakeview - 130  
 Lazear - 132  
 LIFE Academy - 335  
 Lockwood - 134  
 Longfellow  
 Madison - 215  
 Manzanita - 137  
 Markham - 138  
 Marshall - 174  
 Martin L. King - 182  
 Maxwell Park - 139

McClymonds -  
 Melrose ES - 141  
 Melrose Leadership Academy - 235  
 Oakland Senior High - 304  
 Oakland Tech – 305  
 Parker - 144  
 Prescott - 147  
 Roosevelt - 212  
 Rudsdale Academy -  
 Santa Fe - 150  
 Sherman - 153  
 Simmons - 205  
 Skyline - 306  
 Sobrante Park - 154  
 Stonehurst - 155  
 Swett /Tilden  
 Washington  
 Webster - 162  
 Whittier – 163

**Total: 57**

Type of Complaints	Total Number of Complaints filed	Total Resolved	Total Unresolved (in process)
Facilities Condition	12	7	5
<b>Totals</b>	<b>12</b>	<b>7</b>	<b>5</b>



# Deferred Maintenance Program Description

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- The Deferred Maintenance Program (DMP) provides dollar for dollar state matching funds to assist school districts with expenditures for major repair or replacement of existing school building components in roofing, plumbing, heating, air conditioning, electrical systems, wall systems, floor systems, etc.
- 5-year plan forecasts projects over 5-year period, may be amended as needed



# I.F.A.S. Work Order System

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**B&G has implemented a new work orders system, I.F.A.S. (Integrated Fund Accounting System) for work request submission**

**Goal of IFAS is to improve communication between B&G & Sites**

1. Generate response to requestor of work order submission and estimated time frame for completion
  2. Provide status- if not able to be completed by estimated date
- **Four levels of work orders:** Priority level 1 (same day): priority level 2 (1-7 business days): priority level 3 (within 10-30 days, scheduled job): priority level 4 (deferred maintenance)

**Where we are**

- System has been implemented District-wide as of March 30<sup>th</sup>, 2009
- Working with Bio-Tech to improve ease of work order submission
- Generating response when work order is closed





# Vandalism/Graffiti

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## Summary Report - Vandalism & Graffiti

2008-2009

<u>Vandalism/Damage/District Theft</u>	<b>\$133,148</b>
<u>Vandalism/Graffiti B&amp;G Cost</u>	<b>\$348,217</b>
•Carpenter	\$109,558
•Electrician	\$7,692
•Glazier	\$15,460
•Locksmith	\$30,199
•Sheet metal	\$17,293
•Painter (including labor)	\$769,199
•Plumber	\$503
<b><u>Total Vandalism/Graffiti (with Labor)</u></b>	<b>\$1,083,052</b>



## Vandalism/Graffiti cont.

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- As a proactive approach B&G is trying to implement a Guard Patrol service in conjunction with our new Alarm Monitoring Company to reduce vandalism that occurs off-hours (11pm-6am)
- Need assistance from sites to help reduce number of Graffiti incidents during school hours (i.e. keep markers away from student reach, SSO assistance)



## District Water & Energy Conservation

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- B&G has been working with the Facilities Dept. on developing standards in association with the CHPS (Construction of High Performance (Green) Schools)
- We currently uses Low-Volatile Organic Compounds (VOCs) paint
- Water efficient plumbing
- Drought-resistant plants
- Eco-Friendly products for:
  - floor stripping
  - asphalt cleaning
  - graffiti removal
- B&G is also working with the schools sites to support them with their garden programs



# Division of Facilities Planning and Management

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## **Custodial Services Operational Overview**

**Roland Broach, Director**

**May 6, 2009**



# Mission Statement

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**The primary mission of the Custodial Services Department is to serve its' constituents in a proactive manner. The Department shall maintain, operate and protect the District schools, environment in such a way to provide an atmosphere that is conducive to learning, safe and healthy for the entire community of schools.**



# Agenda / Discussion Topics

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- Background
- Budget & Staffing
- Site Evaluations
- Waste Management
- Williams Complaints
- Sweeper Operators
- Custodial Training
- Substitutes
- Performance Management
- Custodial Supplies & Equipment
- Civic Center
- Departmental Survey Data



# Background

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The Custodial Services has 249.5 full-time employees who service 110 k-12 schools sites, 28 child development centers, 6 adult education sites and 5 central locations. This staffing is based on a service model of one custodian who is responsible for cleaning approximately 22,000sq.ft. Services are provided using a modified service economy concept, that charges the sites \$62,000 per FTE, which includes supplies, equipment, supervision and training.



# Budget

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The Custodial Services Budget offers a breakdown of the variable and fixed costs associated with labor and non-labor; while the Staffing Model highlights the specific custodial allocation for each school site.

- Current Staffing Level 2008-2009 ( 249.5 )
- **Impact of 5% cut ( lower staffing level and reduced custodial cleaning crew support )**
- FCMAT recommended level of staffing ( 305 FTE )

**The table below represents 2009-2010 budget; reflecting 238.25 FTE**

Fixed Labor	\$13,508,097
Non-Labor Costs	\$671,400
Total	\$14,179,497





# Budget

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The below spreadsheet indicates the cost per FTE, number of sites, school year and approximate number of total FTE'S for the corresponding school years. In the below chart, the **110** represents the number of k-12 school sites and the **149** represents the total number of cleaning Facilities.

FTE \$	# FTE	# of Sites	Year
\$61,913	249.5	110/149	07-08
\$62,841	249.5	110/149	08-09
\$59,700	238.25	110/149	09-10



# Site Evaluation Process/Quality Assurance

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The Custodial Services Field Supervisors provide routine scheduled inspections in order to evaluate all of the District's schools. The inspections are conducted in accordance with the FCMAT recommended evaluation process and follow the FIT (Facility Inspection Tool) format, which is in accordance with the Alameda County of Education's Williams standards.

The process allows the Custodial Services Field Supervisors and the Building & Grounds Department to collaborate with Administrators in order to assure that the facilities are clean, safe and in good repair.

## Quality Assurance

- FCMAT/FIT Evaluation Form
- Clean Restroom Program



## Site Evaluation Process, cont.

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- (1) Check-in at Office and Sign-in on the visitor or B&G log. Greet the principal; let him/her know why you are on campus today and ask if they will be available to meet after the inspection.
- (2) Conduct inspection and fill out Facilities Conditions Report.
- (3) Obtain signatures from Custodian-in-Charge, Principal or principal designee.
- (4) Give a copy of entire report to Principal or designee and the Custodian in charge.
- (5) The Coordinators from B & G and Custodial Services meet monthly to discuss unresolved issues that pertain to the site's evaluations.
- (6) Unresolved online requests are sorted by craft and given to appropriate shops; B&G report completed requests to Custodial Services.



# Waste Management

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In 2008 Custodial Services piloted a Recycling Program that promotes material management in an attempt to reduce the Districts' carbon production in order to preserve the environment for future generations; while striving to achieve a District wide diversion of 50%.

## Waste Reduction

- Recycling Program
- Goal of 50% diversion
- On-Site Program
- Right sizing of bins (District, Waste Authority, Waste Management)
- Organics Accounts-17 sites with two in planning
- Cost Savings



# Waste Management / Yearly Expenditures



- The below chart captures the Districts yearly expenditures and identifies the importance of reducing our carbon production which realizes costs savings that are associated with recycling. The top chart represents the spending through March-09; while the bottom chart illustrates an actual expenditure through March-09, combined with a projection of spending between April-09 through June-09. **The anticipated cost savings is approximately \$165,314.38.**

Year	Amount Paid
2005-2006	\$1,380,988.64
2006-2007	\$1,411,300.10
2007-2008	\$1,598,633.99
2008-2009	\$1,053,607.73
Total	\$5,444,530.46

Year	Amount Paid
2005-2006	\$1,380,988.64
2006-2007	\$1,411,300.10
2007-2008	\$1,598,633.99
2008-2009	\$1,433,319.61
Total	\$5,824,242.34



## Waste Management / Roll-off Cost

Month	2007-2008	2008-2009
Aug.	\$ 24,587.06	\$ 19,532.44
Sept.	\$ 34,306.77	\$15,055.28
Oct.	\$ 38,023.41	\$ 11,301.83
Nov.	\$ 31,829.07	\$ 6,445.23
Dec.	\$ 33,611.49	\$ 7,576.84
Jan.	\$ 23, 871.77	\$ 10,682.83
Feb.	\$ 37,661.58	\$ 6,937.23
Mar.	\$ 30,343.13	\$7,429.24
April.	\$ 31, 243.53	
May.	\$ 32,701.04	
June.	\$ 28,770.72	
Total:	\$346,949.57	\$84,960.92
Average Monthly Cost:	\$ 31,540.87	\$ 10,620.12



# Williams Complaints

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The Custodial Services Department, in conjunction with the Facilities Planning & Management and Buildings & Grounds departments, fulfills its' obligation of compliance, which is associated with the Williams Complaints, through the departments use of its' Emergency Cleaning crews, Pest Control and Fire Extinguisher services; these services also supports the departments ongoing effort to have clean and safe schools.

## **Safety Measures**

- Emergency Cleaning
- Pest Control Services (Process)
- Fire Extinguisher Services ( Annual & Random Inspection)



# Pest Control Procedure

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## CUSTODIAL SERVICES PEST CONTROL PROCEDURE

- The following steps have been put in place by Custodial Services along with Buildings & Grounds to ensure that the proper rodent abatement occurs at our district facilities.
- School sites' Administrator, designee or custodian phone pest concern to custodial services.
- Upon receiving complaint, Custodial Services will contact Western Exterminator to set up an appointment to go out and service the site.
- Custodial Services will notify the site with confirmation of the date and time of Western Exterminators anticipated arrival.
- Western Exterminator will visit the school's office, assess the situation and set traps where needed.
- Western Exterminator will give Custodial Services a detailed report on the actual assessment along with a corrective action plan.
- Custodial Services will schedule a follow-up visits until abatement is completed.





# Sweeper Operators/Equipment Monitoring

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The Department employs two specialized Sweeper Operators whose primary job responsibility is cleaning playgrounds; this service occurs once every (26) twenty-six days for each school site and is in addition to regular yard cleaning which is offered by the site custodians. This service helps to protect the district's liability by helping to clean areas of the grounds that may not otherwise receive detail cleaning by the custodian(s). The Department has piloted a sweeper training program which in essence incorporated a third sweeper operator which will help to increase the frequency of yard sweeps.

## Equipment Monitoring

The Sweeper Operators distribute, monitor and perform minor, and in some instances major, repair work on custodial equipment.



# Training

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Custodial Services has an extensive mandatory training program; it incorporates an eight (8) day curriculum based classroom training as well as a hands-on field training.

- Permanent Custodial Training (Custodial Institute)
- New Hire Training (Substitutes)
- Pilot Program (On-Line Work Orders)



# Custodial Institute Training Goals

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- **Welcome to the Custodial Institute!**
- The Custodial Institute trains current and new custodial employees on safe work procedures and reinforces Oakland Unified School District's cleaning policies and standards. To accomplish this, the Adult Education Department in partnership with the Custodial Services Department and the American Federation of State, County, and Municipal Employees (AFSCME) have incorporated a combination of classroom and on-the-job training.
- The main goal of the Custodial Institute is to help you achieve the level of training and knowledge you need to do your job better. By becoming a better custodial services professional, you will:
  - increase your chances and opportunities for advancement
  - improve the public image of the cleanliness of the Oakland Unified School District
  - perform high-quality work consistently
  - ensure cost effectiveness and efficiency
  - Custodians fill a position of importance, responsibility, and trust within each school setting. Custodians are a vital part of a larger school team. The way you do your job, and the enthusiasm you show, can have a positive effect on students, staff, and the public. You can help boost the morale of employees and, help improve productivity.
- ***Enjoy the time spent in your Custodial Institute training!***



# Training, cont.

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- **Custodial Service Training**
- **Final Exam**
- Instructor: Angela Lloyd Name: Results: Class: In-Service Training Period: Session VII Date: March 26, 2009  
Carefully read each question and then circle the letter of the correct answer.
- If the restrooms toilet is clogged up you must first
  - attempt to unclog the toilet
  - leave a note for the day custodian
  - close the stall door and place and out of order sign on the door
- When disinfecting your sinks you must make sure that your faucet is
  - Turned off
  - Free of rust and build up
  - Clean and free of all dirt, scum and soil
- Restroom floors should be sanitized daily
  - With all purpose cleaner or disinfectant
  - With bleach
  - With floor neutralizer
- A professional custodian is a custodian who shows \_\_\_\_\_ in the job, and is proactive in making suggestions while \_\_\_\_\_ work capacity.
  - Vague interest and excellent
  - Interest, improving
  - Service with a smile and sluggish
- Productivity must be accompanied by \_\_\_\_\_ work. It is not productive to do \_\_\_\_\_ work even if it takes less time.
  - Quantity, good
  - Quality, poor
  - Excellent custodial, poor



# Substitute Coverage

The Department provides, assigns and monitors substitute custodians for school sites.

- Substitutes Coverage (80 on the roster and 60 active)
- Substitute Assignments (Day, Evening and Emergency)

SUBSTITUTE	TIME	MONDAY 04-13	TUESDAY 04-14	WEDNESDAY 04-15	THURSDAY 04-16	FRIDAY 04-17
ALLEN, ROBIN 3/23	5:30-8	SHERMAN	SHERMAN	SHERMAN	SHERMAN	SHERMAN
AMOS, ALVIN 6/23	2-9:30	OFF				
BRADFORD, MELVIN 10/29	8-4:00	OFF				
BROWN, TYREE 4/13	3-10:30	TRAINING	TRAINING	TRAINING	TRAINING	TRAINING
BROWN, WILLIAM 6/2	3-10:30	OFF	OFF	OFF	OFF	OFF
BYERS, PHILLIP 6/30	9:30/5:30	ASCEND	ASCEND	ASCEND	ASCEND	ASCEND
BUENROSTRO, JOSE 9/22	2-9:30	BREW/O. HIGH	BREW/O. HIGH	BREW/O. HIGH	BREW/O. HIGH	BREW/O. HIGH



## Online Work order Pilot Program

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The Custodial Services Department has piloted an online work order training, which allows custodians to submit online work order requests. This concept focuses on an attempt to relieve the Principals and their staffs of the tedious work associated with submitting the work requests; The training also supports the department's goal, which is in collaboration with the union (AFSCME), to have custodians take ownership of their school sites while acclimating custodians to the technical aspect associated with computer usage.

The Department has received feedback from various Principals and/or secretaries regarding the pilot program.



# Performance Management / Managerial Support

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## **CUSTODIAL SERVICES MANAGERIAL TEAM**

- Custodial Services managerial team is dedicated to establishing a uniformed method of service throughout the Oakland Unified School District that provides a clean and sanitary environment at all schools. Our objective is to assist Site Administrators with understanding core custodial functions while fostering a team like quality work environment. In order to attain these goals, Custodial Services will:
  - In collaboration with Administrators meet to evaluate custodial work performance.
  - Perform complete site inspection.
  - Establish custodial work schedules for the sites.
  - Approve, track and maintain custodial personal and vacation leave request.
  - Assist Administrators with instructing custodians on various tasks.
  - Provide progressive discipline for problematic custodians.
  - Provide sites with substitute placements.
  - Routinely train custodians on the technical aspects of cleaning.
  - Promote team unity between the Administrators, custodians, Parents, Visitors and the Custodial Services Managerial team.
  - Require Head, Lead or Day Custodians to submit weekly restroom inspection forms.
  - Work together with the HRSS on the placement of custodial personnel.
  - Work with Labor Management Employee Relations and AFSCME Local 257 to ensure that employee contractual rights are not violated.
  - Research and develop modern cleaning techniques and methods.



## Performance Management, cont.

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The District has a clearly defined and well circulated cleaning standard on which all evaluations are based. Custodial Services' Field Supervisors conduct monthly site inspections to evaluate the performance of staff and the sites conformance with these standards; Principals are given the opportunity to help support the evaluation process by completing the Principal Feed Back form. The department has implemented, for all school sites, cleaning schedules, outlining specific cleaning timetables and other duties for the Head, Lead, Day, and Night custodians.

- Core Cleaning Outline
  - Cleaning Standards
  - Evaluations
  - Principal Feedback
- 
1. Current Strengths: Partnership with Administrators, Community and Union; the Custodial morale and Custodial Training.
  2. Current Challenges: Regular Custodian & Substitute retention, total FTE count, shared campuses and on-going training.





# Performance Management, cont

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## CUSTODIAL SERVICES CORE CLEANING OUTLINE

Custodial Services main objective is to ensure that the students, staff, parents and all visitors have a clean and safe environment in which to learn, teach and visit. Custodial services have established cleaning standards, scope of work, and a cleaning policy that are core to the essential function which, assists custodial personnel in keeping their schools clean and sanitary. Our daily core services include the following day and night services:

- Restrooms (daily cleaning)
- Classrooms (**alternating A&B cleaning**)
- Hallways (daily cleaning)
- Water fountains (daily cleaning)
- Stairwells (daily cleaning)
- Cafeteria and Multipurpose rooms (daily cleaning)
- Office areas (daily cleaning)
- Gymnasiums and locker rooms (daily cleaning)
- Playgrounds and surrounding areas (daily cleaning)
- Athletic fields (daily cleaning)
- Seasonal cleanings (Summer, Winter & Spring)



# Principal Feedback form

CONFIDENTIAL

## Custodian Performance Feedback Form

Dear Principal or Principal designee,

Custodial Services is beginning our annual performance evaluation process and we need your assistance. As the day-to-day supervisor, you have a deep understanding of the performance of your custodian. Please help us to make the evaluation process more effective by providing your feedback. This feedback is informal and may not appear directly on the formal evaluation form, but will contribute to the Field Supervisor's assessment of performance.

Thank you for your assistance!

Sincerely,  
The Custodial Services Field Supervisor Team

Directions: Please complete this form for each custodian at your school site and either fax to x8036 or email to [terri.ellis@ousd.k12.ca.us](mailto:terri.ellis@ousd.k12.ca.us). An electronic version of the form can be found in the OUSD Site Deliverables library in the Facilities, Equipment and Technology folder.

Site		Custodian Name	
Principal or Principal Designee Name		Date	

Factor	Unsatisfactory	Needs to Improve	Satisfactory	Outstanding
Quality of work Comment:				
Attitude Comment:				
Dependability Comment:				



## Custodial Supplies & Equipment / Green Initiative

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The Department supports the schools sites by the purchasing and monitoring of supplies and equipment. In an effort to help preserve the environment, the department piloted environmentally safe products such as hand soap and floor cleaners. The Department will pilot and advance its use of additional environmentally safe products, which are listed below.

- Purchase
- Distribute
- Monitor
- Repair
- Green Initiative: Wax, Stripper and Trash liners



# Civic Center

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The Department manages the District's Civic Center use by accommodating various organizations that utilize the District's many Schools sites.

## Facility use

- Joint use agreement
- Afterschool programs
- Community use



## Civic Center, cont.

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In accordance with Education Code Section 38130 for the Civic Center Act for Community Use, this code establishes terms and conditions of school facilities used by community organizations and in-house groups. Additionally, a rate analysis was performed and compared with the surrounding school Districts to insure the appropriate fees are being assessed. The Department produced a handbook which outlines the adopted board policy, administrative procedures and guidelines for use; the handbook was Board Approved on October 30, 2008. The District has implemented a database reservation center which allows tracking of permitted events. Accessing the application for Facility use is easily obtainable by logging on the District's website; school facilities and the community may complete the application on-line.

- Strengths: The software manages, tracks and organizes the data
- Challenges: Training the end user on the software



## CIVIC CENTER, cont.

The below chart illustrates types of programs, costs, facilities used and received funds for 08/09:

<b>Programs</b>	<b>Type of Program</b>	<b>Cost to District</b>	<b>Facilities Used</b>	<b>Received Funds</b>
<b>MOU/</b> Unity Council/Cesar Chavez	Non-profit	-\$120,000	1	0
<b>Afterschool #1</b> ASES/21 <sup>st</sup> Century State and Federal Afterschool Programs	Non-profit	0	91	Custodians are paid directly by Afterschool program
<b>Afterschool #2</b> SES	Non-profit	0	91	\$4,015.00
<b>Community Use</b>	Profit/Non-Profit	0	110	\$138,412.25
<b>Joint Use/</b> City of Oakland OPR	Recreation City Government	-\$220,000 yearly	71	0



# Departmental Survey Data

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The District has implemented a Use Your Voice system, which allow the Principals and Community to rate the performances of various departments.

## Use Your Voice Survey

- Scorecard (06-07 & 07-08 Data)
- Mid Year Review (07-08 RATER Tiering Data)

