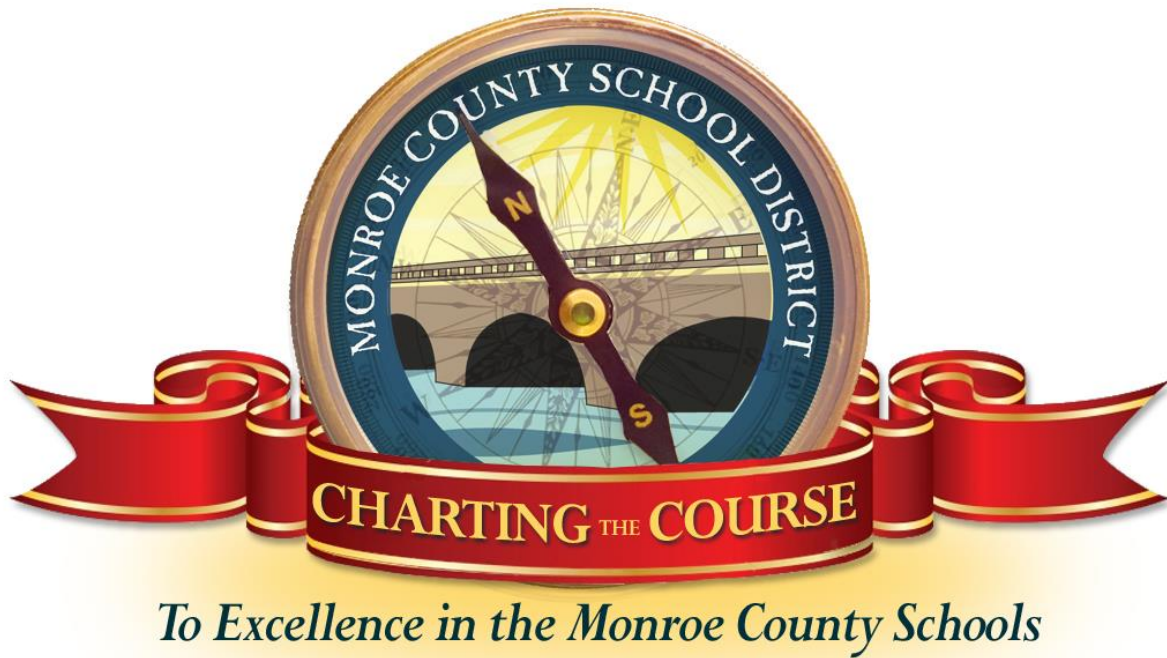


Facilities Maintenance Department



Management Plan

February 7, 2023

PROGRAM DIRECTION and ACCOUNTABILITY

1. Mission Statement, Goals, and Objectives – The Maintenance Department seeks to maintain a clean, healthy, and attractive environment for our students and staff by establishing a safe, productive work place through an efficient and cost effective operation.
 - a. This mission will be achieved by establishing goals and measurable objectives with expected outcomes for major program areas.
 - i. Performance Goal - Run the Maintenance Department including maintenance, custodial, and grounds in a satisfactory manner. Success is an average of the three major facets evaluated as follows: Maintenance annual survey of the principals "considered as a whole" question scored 0-4. Custodial and grounds are based on a composite of school grades assigned by MCSD averaged for the year. A=4,B=3,C=2,D=1,F=0. The target is 3 or higher for each facet.
 - b. These goals will include projections for manpower, budget, equipment, and physical condition tracking of district facilities.
 - i. Manpower see 4. Organizational Structure and Staffing
 - ii. Budget see 3.a.iii and 6
 - iii. Equipment see 3.a.i
 - iv. Facility Condition see 3.a.iv
2. Accountability
 - a. The department will monitor performance and cost efficiency as follows. Tracking of the major performance goals that looks at maintenance, custodial, and grounds as described above with a score of 3 or higher on a 0-4 scale. Cost efficiency will be tracked using data from the DOE cost data worksheet and comparison to peer districts both in size and location. These benchmarking tools will be used to shape management decisions on program improvement opportunities.
 - b. The accountability facets of performance and cost efficiency shall be monitored annually.
 - c. Quarterly the performance of maintenance, custodial, and grounds shall be reviewed to verify programs are on track to meet goal. At the same intervals program costs shall be evaluated and opportunities for increased efficiency shall be reviewed.
3. Procedures and Staff Performance Standards for Efficient Operations
 - a. Key Procedures
 - i. Replacement and Selection of Equipment – Maintenance Department Management shall review equipment used by the district on a continual basis. During December and January equipment to be replaced should be finalized. Replacement prioritization shall encourage proactive replacement prior to catastrophic failure requiring emergency replacement.

Consideration should be given to select the most cost effective equipment based on the following facets.

1. Anticipated life cost including maintenance expenses.
 2. Impact on indirect maintenance problems like IAQ, staffing, or specialized contracting needs for support.
 3. Minimization of required maintenance to operate within normal parameters.
 4. Ease of maintenance incorporated into the design.
 5. Quality of construction required for schools in coastal environments.
 6. Source and availability of parts needed to keep operational.
- ii. Purchasing of equipment, supplies, and materials
1. All purchasing and procurement shall follow district policy 6320.
 2. Non-capital purchases with no single item over \$1000 should be put on District Purchasing (P Card). Use of the P card for larger purchases shall be reviewed with Department Management prior to making the purchase.
 3. Purchases under \$5,000 should be made from vendors providing the best price, delivery, and availability to quickly meet the needs of the district. Coordinate with Department Management prior to making purchases over \$1,000.
 4. Purchases from \$5,000 through \$50,000 require a pricing request sent to at least three vendors. These purchases shall be coordinated through Department Management. Documentation of the purchasing process shall be maintained by the purchaser.
 5. Purchases over \$50,000 shall be coordinated through the district purchasing department. These shall follow the requirements of District Policy, Florida Statutes, and shall be Board approved.
- iii. Maintenance and operations budgeting shall begin in January of each year. Analysis of changes effecting the budget shall be noted and adjustments made. Opportunities for cost savings efficiency shall be reviewed at the department level in Facilities Team Meetings. Department final budget shall be reviewed with Executive Leadership and the Finance Department as it is made a part of the overall district budget. Final budget is Board approved with the District budget.
- iv. Facility Standards – Feedback established via benchmarking described in 1.a.i.
1. Safety – Educational facilities shall be maintained to create a safe learning environment that is free of environmental

hazards and occupational risks for students, staff, school administration, and the general public.

2. Sanitation – School buildings shall be cleaned on a daily basis to promote public health and to ensure sanitary conditions, especially in the classrooms, rest rooms, laboratories, cafeterias, clinics, locker rooms and other areas prone to germs, bacteria and disease.
 3. Security – Educational facilities shall be maintained in such a manner to protect occupants, property, and equipment from vandalism, theft, intrusion, and natural disasters.
 4. Functional Performance – maintenance and operations activities shall ensure that buildings, grounds, and equipment facilitate the educational process and function in an economical and efficient manner.
 5. Physical Condition – maintenance and operations activities shall ensure that all buildings, components, and equipment are sound, in good serviceable condition, and otherwise in good working order.
 6. Appearance – Educational facilities shall be maintained to achieve an attractive and clean level of appearance.
- v. Staffing and hiring policies and Use of Facilities and District Equipment.
1. Maintenance Department hiring follows district policies. See district policies in section 4000 Support Staff.
 2. The use of district Facilities and Equipment shall follow the District Policy 7510.
- b. The Maintenance Department Management Plan is available to the staff and the public on via the District's website under the tab for the Maintenance Department.
- c. The Facilities Maintenance department goals stated in section 1.a.i. shall be shared with the department staff and associated contractors via the District's website.
- i. District Facilities Maintenance staff shall be reviewed using benchmarking from the School Dude work order system. Comparisons will show district performance compared to other districts. Items reviewed may include:
 1. Average work orders per technician
 2. Percentage of corrective maintenance completed in <7 days
 3. Average hours documented per work week
 4. Percentage of work orders completed with quality data
- d. The Maintenance Department shall ensure that all district buildings are maintained in an equitable fashion. Data collected from item 1.a.1 shall document the equity achieved. Sites not in line with the district standard

shall be identified and improvement plans developed to correct. These plans will be shared with school administration and District Executive leadership.

- e. Maintenance Department performance will be routinely monitored by Department Management concentrating on the goals set in 1.a.1. Failures to meet established standards will be reviewed with the Executive Director of Operations at bi-monthly Facilities Team Meetings.

ORGANIZATIONAL STRUCTURE and STAFFING

- 4. Organizational Structure and Staffing – The Facilities Maintenance Department shall review the organizational structure as needed to ensure adequate supervision and staffing levels while minimizing administrative layers.
 - a. The Department shall strive to maintain staffing based on the board approved organization chart found at the end of this document.
 - i. Appropriate supervision of maintenance and operation programs shall be monitored via the Annual Satisfaction Survey from the Principals and the cost data documented by DOE.
 - ii. District job descriptions provide delineation of levels of authority and responsibility for each position listed in the Organizational Chart.
 - iii. The district will strive to maintain management and office support staffing at the level of 1 support position/6.8 mechanics but no less than 2 supervisory managers and 2 office managers. One each shall be located in the upper keys and lower keys Maintenance offices.
 - b. Department staffing levels shall be reviewed as district conditions like gross square footage change. At a minimum they shall be considered annually during the budget cycle. Other input like Principal feedback, the public, and trends from other districts should be considered. A reference point of staff per gross square feet as recorded in FISH shall be used as a starting point for staffing levels.
 - i. Custodial services are contracted out based on 1 custodian per 26,000 gross SF for schools and 1 custodian per 40,000 SF for administrative and ancillary buildings. Staffing is reconsidered every four years when the program goes out for pricing. Program value and success is considered along with Department, Principal, and public input.
 - ii. Maintenance staffing is considered each year during the budgeting and planning cycle. It is roughly based on one maintenance technician per 50,000 GSF of building. Staff needs are reviewed vs. demands of the 5-year plan and long-term needs. Contracting is used to address peak loads and specialty services.

- iii. Staffing adjustments are considered when adding or reducing gross square footage. Additional custodians are considered with changes greater 26,000 SF. Addition maintenance staff are considered with changes of greater than 50,000 SF. Considerations also include program tracked performance rate and fund availability.
 - iv. Similarly staffing changes are reviewed with decreases in gross square footage. Buildings greater than 30 years in age are given special consideration to see if additional staffing is needed to meet program performance requirements.
 - v. Significant findings noted in staffing needs are reported to the School Board and public through appropriate channels as changes are needed. Custodial program bid documents are circulated on the district website during the contracting phase.
- 5. District job descriptions in conjunction with the department organizational chart define the program's lines of authority and spans of control. These are based on industry models of management, leads, and workers.
 - a. Department job descriptions shall exist for all positions in the Department's organization chart. These job descriptions shall reflect the current district needs for these positions. These shall be reviewed and updated when changes in the organization chart are needed but no less than every five years.
 - i. Job description review and development shall include both Department Management and HR staff.
 - ii. Job descriptions shall be available on the district website for staff and applicants to review.
 - b. Vacancy advertisement shall be done by the district HR department according to district policy and procedures for hiring. In an effort to attract the best applicants, vacancies shall be advertised on the district website. If needed to reach a broader audience the Department Management may work with the district HR department to advertise in local newspapers and via online resources.
 - c. Job vacancy notices will be done by the district HR department. They shall briefly describe responsibilities, special qualifications, and compensation range. Links to the district job descriptions shall be provided to allow more complete descriptions of the job.
 - d. Prior to hiring, candidate's references and experience shall be verified by the district's HR department via their established policies and procedures.

RESOURCE ALLOCATION and UTILIZATION

- 6. The department shall prepare budgets annually under the supervision and approval of the district Finance department. The budget shall be based on lawful funding of each facet of facility maintenance and operation.

- a. All budgets shall be reviewed and approved by the Finance department to ensure compliance with the lawful use of funds. Final budgets shall be reviewed by legal and then be board approved.
 - b. Long term goals for maintaining and operating district facilities shall be budgeted in the district's annual five year work plan and forecast. This is updated each year between March and May and feeds into the overall district budget. The district Master Project List provides detailed project listing.
 - c. Ongoing and reoccurring maintenance tasks shall be budgeted in the district's annual five year work plan and forecast. The district Master Project List provides detailed project listing. This shall be done to avoid unexpected repair or replacement costs.
 - d. Funds shall be allocated in the district's annual five year work plan to address deferred maintenance needs. The district Master Project List provides detailed project listing.
 - e. The budget shall be periodically monitored for evaluation of planned vs actual expenses using the features in the FOCUS business management system.
 - f. Department budgeting shall be done considering multiple factors including planned changes, new requirements, and changes in scope. Custodial and grounds services shall be contracted via district competitive purchasing policies. Contracts amounts shall be used in budget development.
 - g. The budgets shall account for the correction of deficiencies noted in the district's annual safety, casualty, and fire safety inspection reports. Corrections of these noted items shall be tracked in the School Dude work order reporting system to demonstrate that budgeted money was correctly used.
7. During the five year work plan budgeting cycle, budgets for major maintenance projects shall be developed. The district Master Project List provides detailed project listing.
- a. Budgets shall be estimated using a variety of resources available including: past projects, unit pricing, and possible changes in local market conditions. These estimates are noted in the support documents for the five year work plan and in the requests for bidding.
 - b. Annual inflation costs shall be estimated and incorporated into projects as they are planned and budgeted.
 - c. Results from past estimates vs actual costs shall be considered when preparing new project budgets for the five year annual work plan.
8. A reserve fund shall account for unplanned, one time expenditures needed to support maintenance and operations efforts. This money shall be noted in the district five year work plan with sites identified as *ALL*.

- a. The maintenance reserve funds are found in the district five year work plan. Money is set aside in this manner to prevent it from being used for recurring expenses like general fund salaries.
 - b. Funds budgeted in the five year work plan shall remain flexible to ensure funding of unforeseen maintenance needs that could adversely affect the district's mission. The budget amendment and approval process shall be used to move and approve the allocation of these funds.
- 9. The District Maintenance Department shall seek to minimize equipment costs through its purchasing practices.
 - a. Maintenance management shall review equipment targeted for replacement during facility team meetings. Once details are reviewed specifications shall be made and equipment shall be procured by competitive selection unless sole sourcing is required due to the district's commitment to a proprietary system technology. All procurement shall be done in accordance with district policy and procedure including review and sign off by purchasing and finance departments.
 - b. Where possible and practical the district maintenance department shall make volume purchases and direct owner purchases to reduce purchasing prices. This is typically done via grouping in projects that are bid through the purchasing department.
 - c. Prior to major equipment purchases being considered the management shall review and consider maintenance and operation costs of new equipment options. These shall be discussed at facility team meetings to get input from all team members prior to selecting equipment to purchase.
 - d. Prior to major equipment purchases for replacement equipment, the local maintenance manager shall consider the cost and options of repair or refurbishing versus the cost of replacement. If repair costs and the extended life of the equipment prove out that they are lower than the annualized price of new equipment, then repair or refurbishing should be considered. An example is compressor or coil replacement vs. complete condensing unit replacement (Reference AC replacement bid of 2022).
 - e. If anticipated inflationary costs are greater than 3% per year, these additional costs shall be reflected in budgets for equipment replacement in the five year plan support documents like the Master Project List.
 - f. Replacement projections for plant and maintenance equipment shall be done each year. Plans and budgets made shall be documented in the five year plan support documents and department budget as appropriate. This shall take place each year as part of the budgeting process.
- 10. The Maintenance Department shall use proactive maintenance practices to reduce maintenance costs.
 - a. Department Management shall work with department field workers to develop preventative maintenance (PM) strategies to reduce labor and

long term replacement costs. As facets of PM are implemented and assimilated new facets should be considered.

- b. A PM system shall be implemented through the School Dude work order system.
 - c. Contracts for continuing service shall be reviewed to confirm work is being performed as contracted. An example is the grading system associated with the contracted custodial program.
 - d. The Maintenance Department shall follow district policy 7320 on the disposal of district surplus material.
11. The Maintenance Department shall identify and implement strategies to contain energy costs as supported by the Board.
- a. The Maintenance Department shall use the Energy Star Utilities Tracking program to track and compare building utility costs. The district's Lead Controls Technician will look for opportunities to increase building efficiency without sacrificing campus operations. Opportunities identified shall be explored with local utility experts, MEP engineers, or system vendors. Viable initiatives shall be added to the district five year work plan for implementation.
 - b. The department shall have a written energy management plan.
12. The Maintenance Department shall use a computerized building control system to control HVAC and exterior lighting.
- a. The written energy management plan shall aid the district in identifying and implementing energy saving strategies.
 - b. The Lead Controls Technician shall generate reports for review by managers confirming the proper operation of the building control system. Buildings or units that are identified as having issues shall be noted and work orders generated for corrective work.
 - c. For buildings or areas that are noted to have control system inefficiencies, the Lead Controls Technician shall recommend improvements to be consider for implementation. Viable plans shall be added to the district five year work plan for implementation.
13. The Maintenance Department shall consider opportunities for out-sourcing or contracting. Considerations shall include not just cost but also factors such as: Peak or seasonal work, specialized work, and work more effectively executed by contractors. Some examples are seasonal paint work, specialized fire alarm system work, and large programs like custodial services.
- a. Existing contracted services and potential new contracted services shall be reviewed at Facilities Team meetings. Costs and benefits shall be discussed. If needed written comparisons shall be made to aid in the review of a contacted service.
 - b. Contracted services performance shall be graded and tracked. Performance shall be reviewed in Facilities Team meetings. If deficiencies

are noted specific costs analysis shall be done to determine if contracting still represents the best solution for the district.

INFORMATION MANAGEMENT

14. The Maintenance Department shall use the School Dude management system allowing for the accurate tracking of work orders and inventory used.
 - a. The School Dude system shall be used to provide work order assignment, scheduling, prioritization, reporting, and preventative maintenance programming to increase the department's management capability.
 - i. The School Dude system shall be used to have employees charge time to individual work orders as work is performed. The system shall be capable of tracking materials to be used on certain work orders for total cost calculation and reporting.
 - ii. Due to the unique geography of the Keys it is not feasible to use centralized warehousing for stocking commonly used materials. Instead, materials shall be ordered and noted to specific work orders. The School Dude system shall be capable of keeping track of inventory and equipment including that on maintenance vehicles should the district chose to implement.
 - iii. The School Dude system shall have the capability to signal the need to reorder stocked materials should the district ever choose to implement that method of supply.
 - iv. Expenses shall be tracked using the work order number.
 - b. District maintenance staff shall be stationed in the primary geographic area of their work. This is to reduce the inefficiency of excess drive time. At a minimum staff will be located in Key West, Marathon, and Tavernier. Travel time shall be accounted for in the total time charged to a work order.
 - c. School Dude work order reports shall be generated and evaluated on an as needed basis to pursue employee productivity issues, project tracking, and evaluation of outstanding work needing to be performed.
15. The Maintenance Department shall use a prioritization system to address maintenance needs uniformly across the district. This shall be reviewed annually in the results of the department satisfaction survey. Regional discrepancies shall be noted and addressed.
 - a. All work orders shall receive a priority rating to aid mechanics in scheduling their work. This priority rating shall be based on a documented rubric with explanations of each priority level. The priority shall be noted on each work order when sent to the mechanic.
 - b. Mechanics shall in turn complete work orders following this prioritization. This is to ensure that emergency and high priority work orders are performed prior to routine or normal work orders.

- c. Staff location and work order prioritization shall be organized such that each school receives the work needed to operate efficiently. This shall be reflected in the department satisfaction survey and shall be reviewed annually.
- d. The department shall resolve or secure emergency work orders as soon as possible. No response shall take more than 24 hours. The school dude reporting shall allow for the tracking and review of the resolution of emergency work orders. If department satisfaction surveys show a need to investigate, these emergency work order reports shall be analyzed and strategies for improved performance shall be devised.
- e. The School Dude work order system shall have an emergency priority. Department staff shall all be trained to secure work orders with this priority within 24 hours. Maintenance management staff will bring in additional staff or contractors needed to secure a confirmed emergency work order.

HEALTH and SAFETY

- 16. Health and Safety – The Maintenance Department shall comply with Federal and State regulatory mandates regarding facility health and safety conditions.
 - a. The Maintenance Department shall follow the rules and guidelines of the EPA, OSHA, State and Federal Hazardous Material regulations, and AHERA asbestos management. See Facilities Maintenance Inspection List.
 - b. As available the Maintenance Department shall participate in State and Federal voluntary efforts regarding facility health and safety conditions. Any cost savings or cost avoidance shall be documented.
- 17. The Maintenance Department shall follow the Florida Building Code's requirements for permitting and inspection as enforced by the District's Building Official.
 - a. Facilities Maintenance Management staff shall be trained in SREF and the Florida Building code as it applies to educational facilities. They shall also be aware of other applicable State and Local requirements as they apply to educational facilities.
 - b. All projects requiring permits shall be permitted through the District Building Official prior to the start of work. If there is doubt as to if a project requires a permit, Facilities Maintenance staff shall contact the Building Official for direction.
 - c. The Maintenance Department shall review the Florida Building Code for required inspections. A list and schedule shall be developed in conjunction with the District Building Official to ensure that all required inspections take place. See the Facilities Maintenance Inspection List.