



CSIS California School Information Services

Jefferson Elementary School District

Maintenance and Operations Review

June 12, 2018



Michael H. Fine
Chief Executive Officer







CSIS California School Information Services

June 12, 2018

Bernardo Vidales, Superintendent
Jefferson Elementary School District
101 Lincoln Avenue
Daly City, CA 94015

Dear Superintendent Vidales:

In February 2018, the Jefferson Elementary School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for a review of the district's maintenance and operations programs and services. Specifically, the agreement states that FCMAT will perform the following:

1. Conduct an organizational and staffing review of the Maintenance and Operations Department (including grounds and custodial) and make recommendations for improvement, if any.
2. Evaluate the current workflow and distribution of functions in the department and make recommendations for improved efficiency, if any.
3. Review the operational processes and procedures for the department and make recommendations for improved efficiency, if any.

This report contains the study team's findings and recommendations.

We appreciate the opportunity to serve you and we extend thanks to all the staff of the Jefferson Elementary School District for their cooperation and assistance during fieldwork.

Sincerely,

Michael H. Fine
Chief Executive Officer

FCMAT

Michael H. Fine, Chief Executive Officer

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About FCMAT

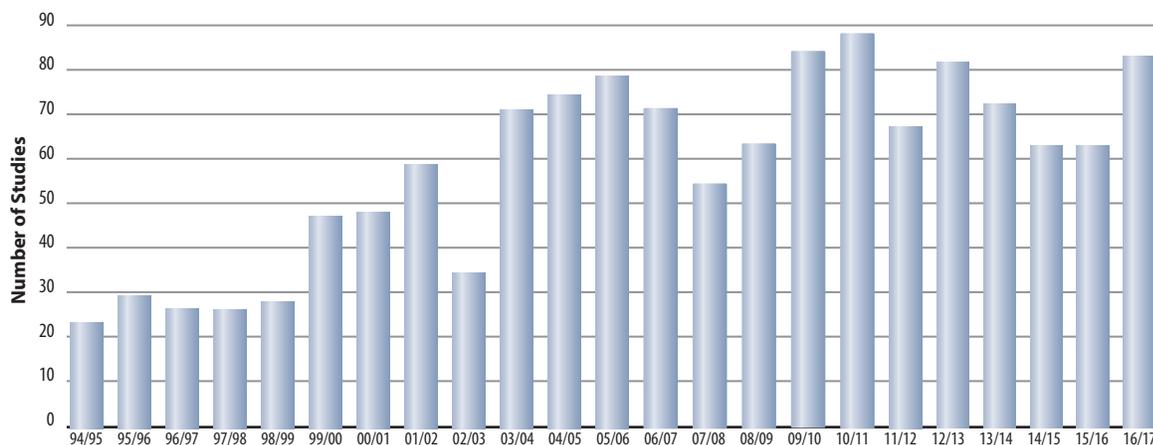
FCMAT's primary mission is to assist California's local K-14 educational agencies to identify, prevent, and resolve financial, human resources and data management challenges. FCMAT provides fiscal and data management assistance, professional development training, product development and other related school business and data services. FCMAT's fiscal and management assistance services are used not just to help avert fiscal crisis, but to promote sound financial practices, support the training and development of chief business officials and help to create efficient organizational operations. FCMAT's data management services are used to help local educational agencies (LEAs) meet state reporting responsibilities, improve data quality, and inform instructional program decisions.

FCMAT may be requested to provide fiscal crisis or management assistance by a school district, charter school, community college, county office of education, the state Superintendent of Public Instruction, or the Legislature.

When a request or assignment is received, FCMAT assembles a study team that works closely with the LEA to define the scope of work, conduct on-site fieldwork and provide a written report with findings and recommendations to help resolve issues, overcome challenges and plan for the future.

FCMAT has continued to make adjustments in the types of support provided based on the changing dynamics of K-14 LEAs and the implementation of major educational reforms.

Studies by Fiscal Year



FCMAT also develops and provides numerous publications, software tools, workshops and professional development opportunities to help LEAs operate more effectively and fulfill their fiscal oversight and data management responsibilities. The California School Information Services (CSIS) division of FCMAT assists the California Department of Education with the implementation of the California Longitudinal Pupil Achievement Data System (CALPADS). CSIS also hosts and maintains the Ed-Data website (www.ed-data.org) and provides technical expertise to the Ed-Data partnership: the California Department of Education, EdSource and FCMAT.

FCMAT was created by Assembly Bill (AB) 1200 in 1992 to assist LEAs to meet and sustain their financial obligations. AB 107 in 1997 charged FCMAT with responsibility for CSIS and its state-wide data management work. AB 1115 in 1999 codified CSIS' mission.

AB 1200 is also a statewide plan for county offices of education and school districts to work together locally to improve fiscal procedures and accountability standards. AB 2756 (2004) provides specific responsibilities to FCMAT with regard to districts that have received emergency state loans.

In January 2006, Senate Bill 430 (charter schools) and AB 1366 (community colleges) became law and expanded FCMAT's services to those types of LEAs.

Since 1992, FCMAT has been engaged to perform more than 1,000 reviews for LEAs, including school districts, county offices of education, charter schools and community colleges. The Kern County Superintendent of Schools is the administrative agent for FCMAT. The team is led by Michael H. Fine, Chief Executive Officer, with funding derived through appropriations in the state budget and a modest fee schedule for charges to requesting agencies.

Introduction

Background

The Jefferson Elementary School District serves students in prekindergarten through eighth grade from four contiguous areas in San Mateo County; Daly City, the town of Colma, unincorporated Broadmoor Village, and a small section of the city of Pacifica. Daly City, with an estimated population of approximately 100,000 is the largest political unit in the four areas and all of San Mateo County. The population of the four communities is socioeconomically, ethnically, and culturally diverse.

The district serves approximately 6,000 students in a population that speaks more than 20 languages. It includes a state preschool, eleven elementary schools, three intermediate schools, a maintenance/warehouse facility and a district office.

In February 2018 the district requested that FCMAT review the maintenance and operations programs and services to aid the department in meeting its goals.

Study and Report Guidelines

FCMAT visited the district on March 20, 21 and 22 to conduct interviews, collect data and review documents. Following fieldwork, FCMAT continued to review and analyze documents. This report is the result of those activities.

FCMAT's reports focus on systems and processes that may need improvement. Those that may be functioning well are generally not commented on in FCMAT's reports. In writing its reports, FCMAT uses the Associated Press Stylebook, a comprehensive guide to usage and accepted style that emphasizes conciseness and clarity. In addition, this guide emphasizes plain language, discourages the use of jargon and capitalizes relatively few terms.

The study was not requested to investigate a fiscal crisis or budget problem.

Study Team

The study team was composed of the following members:

Eric D. Smith, MPA
FCMAT Intervention Specialist
Bakersfield, CA

Brad Pawlowski*
Chief Operations Officer
Sanger Unified School District
Sanger, CA

Leonel Martínez
FCMAT Technical Writer
Bakersfield, CA

Chris Johnston*
Assistant Superintendent for Business
Pleasant Valley School District
Camarillo, CA

*As members of this study team, these consultants were not representing their respective employers but were working solely as independent contractors for FCMAT.

Each team member reviewed the draft report to confirm accuracy and achieve consensus on the final recommendations.

Executive Summary

FCMAT conducted an organizational and staffing study to provide the district governing board and administration with an independent and external review of its Maintenance and Operations Department. In doing so, FCMAT compared the organizational structure with the industry standard using basic theories of organizational structure, which include span of control, chain of command, and line and staff authority.

A director of maintenance and operations who has been with the district for less than two years manages the Maintenance and Operations Department, which is responsible for approximately 683,633 square feet of buildings at 20 different sites. The district outsources all grounds maintenance, and all of the custodians report directly to their respective school site principals. The director of maintenance and operations also takes the lead on all of the district's facility projects that include new construction and modernization. The district plans modernization work, so this limits the amount of time the director has to supervise and oversee the maintenance staff's productivity. This is a large department with a new director and increased standards and expectations. The department has inadequate line and supervisory support to accomplish the necessary reform.

In an effort to help the director oversee maintenance staff, the district has developed a memorandum of understanding (MOU) with the local California School Employees Association (CSEA) chapter to allow a unit member to work provisionally as a part-time maintenance coordinator (management position). This employee does not participate in the staff evaluation process or provide discipline, yet is responsible for managing the work order system, ordering parts, coordinating repairs, and occasionally directs the work of maintenance staff. This situation has created confusion among maintenance staff members and has not delivered a greater level of supervision.

The organizational structure of the custodial employees is site-based, with one custodian working a day shift, followed by a night custodian. The larger middle school sites have an additional part-time night custodian. Two lead maintenance and operations custodians operate in a staff authority capacity. These two positions are nonmanagement and assist the custodians with ordering supplies, occasional training, and sometimes scheduling. The custodial department lacks a centralized management structure; each custodial team operates individually and is managed by the school site principal.

The culture of the Maintenance and Operations Department has evolved over time. The previous director had lengthy tenure with the district, but did little to hold employees accountable. As a result, some employees try to avoid work by claiming that job assignments are not their responsibility or refer to their positions by titles that differ from their job descriptions. These behaviors decrease accountability and make it difficult to align expectations with job descriptions. The district should update job descriptions for the maintenance and operations staff and align these descriptions with actual duties.

Some maintenance and operations staff members perceive that the director's approach as authoritarian, and operations employees were not consulted or included in decision-making. Others indicate that the director was not approachable. As employees are held increasingly accountable to work standards and quality, the culture of the department will become more collaborative.

The director should consider employee input and the formation of a collaborative team to review processes to ensure they are in line with district practices before announcing final decisions.

This could counter some negative perceptions, communicating that the employees' opinions are valued.

FCMAT's review indicated that employee evaluations are inconsistent, and some personnel have not been evaluated in two years. Performance evaluations are important in providing feedback, recognizing quality performance and establishing expectations for job performance.

The district does not have a formalized preventive maintenance plan. During interviews, staff indicated that outside contractors are often utilized for routine repairs, and dirty or plugged air-conditioning filters are a common diagnosis. Air filter replacement is a basic preventive maintenance task. It is evident the Maintenance and Operations Department has resorted to operating in a reactionary mode as a result of past cost-cutting measures and efforts to align resources to student services. This type of program is considered a hands-off method with the goal of keeping maintenance costs low; however, it will prove costly in the long run. Equipment that fails without warning must be repaired immediately, resulting in higher costs. Additionally, equipment that fails during a critical time can create an uncomfortable or potentially unsafe environment for students and staff.

Custodial staff evaluations are inconsistent across the district. As a result, some ineffective custodial employees avoid progressive discipline and may be transferred to another site. FCMAT observed that some principals evaluate day custodians intermittently, and night custodians are not evaluated at all.

Because of this disjointed organizational structure, cleaning methods and standards vary from site to site, and the district lacks both established districtwide cleaning standards and a custodial handbook to disseminate them. There is no central custodial supervisor to establish standardized custodial training or ensure that proper procedures are followed districtwide.

Day custodians are expected to perform light maintenance tasks; however, they indicate they do not possess the proper hand tools to do so. Some custodians reported that when hand tools are purchased, they wind up missing. Other custodians report bringing their own tools.

Findings and Recommendations

Organizational Structure

A school district's organizational structure should establish the framework for leadership and the delegation of specific duties and responsibilities for all staff members. This structure should be managed to maximize resources and reach identified goals and should adapt as the district's enrollment increases or declines. The district should be staffed according to generally accepted theories of organizational structure and the standards used in other school agencies of similar size and type. The most common theories of organizational structure are span of control, chain of command, and line and staff authority.

Span of Control

Span of control refers to the number of subordinates reporting directly to a supervisor. While there is no agreed-upon ideal number of subordinates for span of control, it is generally agreed that the span can be larger at lower levels of an organization because subordinates at the lower levels typically perform more routine duties, and therefore can be more effectively supervised, according to *Principles of School Business Management* by Craig R. Wood, David C. Thompson and Lawrence O. Picus.

Chain of Command

Chain of command refers to the flow of authority in an organization and is characterized by two significant principles. Unity of command suggests that a subordinate is accountable to only one supervisor, and the scalar principle suggests that authority and responsibility should flow in a direct vertical line from top management to the lowest level. The result is a hierarchical division of labor as described in *Principles of School Business Management*.

Line and Staff Authority

Line authority is the relationship between supervisors and subordinates. It refers to the direct line in the chain of command. For example, the assistant superintendent of business services has direct line authority over the director of facilities maintenance and operations, and the director of facilities maintenance and operations has direct line authority over the Maintenance and Operations Department staff. Conversely, staff authority is advisory. Staff personnel do not have the authority to make and implement decisions, but act in support roles to line personnel. The organizational structure of local educational agencies contains both line and staff authority.

The purpose of any organizational structure is to help district management make key decisions to facilitate student learning while balancing financial resources. The organizational design should outline the management process and its specific links to the formal system of communication, authority and responsibility needed to achieve the district's goals and objectives.

Maintenance and Operations Department Structure

The director of maintenance and operations manages the Maintenance and Operations Department and has worked with the district for less than two years. The department is responsible for approximately 683,633 square feet of buildings at 20 different sites. The district outsources all grounds maintenance, and all custodians report directly to their respective school site principal. The director of maintenance and operations also takes the lead on all of the

district's facility projects that include new construction and modernization. Because the district plans modernization work, the director has a limited amount of time for supervising and overseeing maintenance staff productivity.

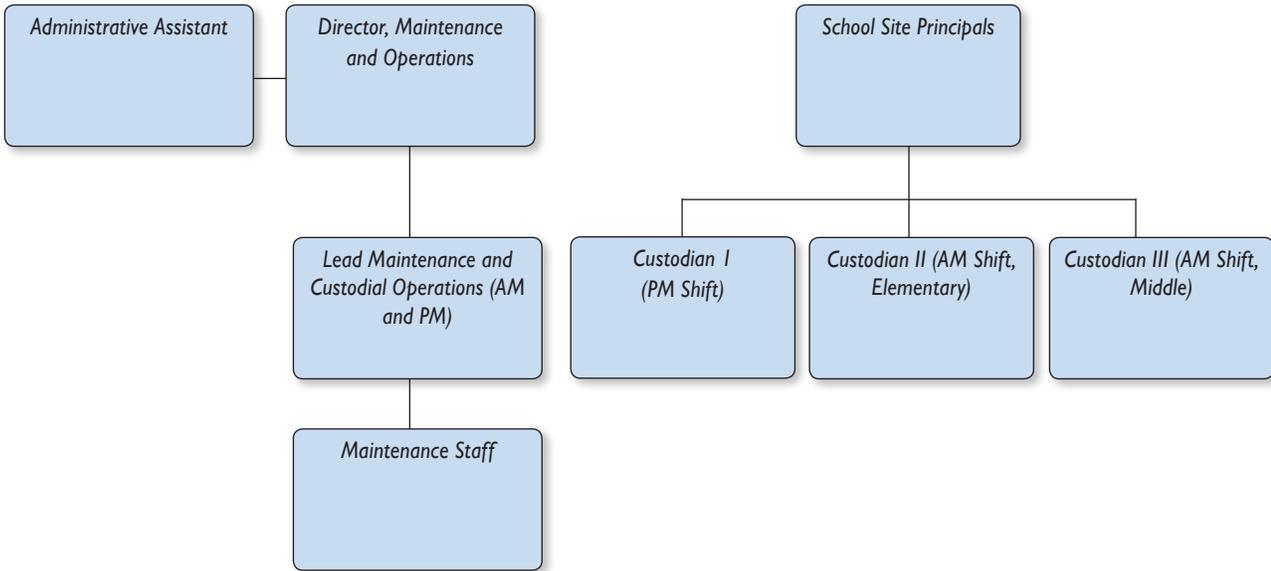
In an effort to help the director oversee maintenance staff, the district has developed a memorandum of understanding (MOU) with the local California School Employees Association (CSEA) chapter to allow a unit member to work provisionally as a part-time maintenance coordinator (management position). This employee does not participate in staff evaluation or discipline, but is responsible for managing the work order system, ordering parts, coordinating repairs, and informally assigning work orders. This situation has created confusion among maintenance staff members and has not delivered a greater level of supervision. One option is for the district to eliminate the part-time maintenance coordinator position and consider creating a full-time, management-level position to directly supervise the maintenance staff line employees.

The custodial employees' organizational structure is site-based, with one custodian working a day shift, followed by a night custodian. The middle school sites have an additional part-time night custodian. Two lead maintenance and operations custodians operate in a staff authority capacity. These two positions are nonmanagement positions that assist the custodians with ordering supplies and in some instances, scheduling. The custodial department lacks a centralized management structure; each custodial team operates individually and is managed by the school site principal.

The Maintenance and Operations Department has one administrative assistant who works 7.5 hours per day and has been in the department for more than 27 years. This individual, who has a significant amount of historical knowledge, is responsible for processing requisitions, matching vendor invoices with purchase orders and answering phone calls for the department. The administrative assistant should adapt to changes as the department and delivery of services evolves. One example is the processing of electronic requisitions through the district's financial system, which has been in place for more than 10 years. Use of this type of technology can be intimidating when it is sporadic, so staff has been resistant to change. All staff members who use district specific technology (email, work order system, and financial system) benefit from ongoing training to enable proficiency in the use of technology and so they can be held accountable to fulfill the required duties of their job descriptions.

The Maintenance and Operations Department processes approximately 2,700 work orders per year and has a budget of more than \$1.6 million. While the district does not have a transportation department, maintenance has the responsibility of coordinating charter buses for school sites on an as-needed basis.

Current Organizational Structure



Organizational Culture

Organizational culture is a system of shared assumptions, values, and beliefs that govern how people behave in school districts. These shared values influence employees and dictate how they dress, act, and perform their jobs. Every school district has a unique culture that is not formal, but shaped by the leadership's actions over time.

The Maintenance and Operations Department's culture has evolved over the years. The previous director had lengthy tenure with the district and had strong personal relationships with his employees, but did little to hold them accountable. As a result, some employees try to avoid work by claiming that assignments are not their responsibility or refer to their positions by titles that differ from their job descriptions. These behaviors decrease accountability and make it difficult to align expectations with job descriptions. The district could benefit from updating job descriptions for maintenance and operations staff, aligning them with actual duties.

Some maintenance and operations staff members perceived the director's management style as authoritarian, and operations employees were not consulted or included in decision-making. Others stated that the director was aloof and unapproachable. This is often the case when a new management employee takes over from a longtime supervisor with many informal practices in place. To improve services to school sites and staff morale, the Maintenance and Operations Department culture should be changed, but this change should occur incrementally over time.

The director should formally consider, along with new supervisory staff, employee input on proposed changes and publish these opinions when announcing final decisions. This demonstrates the employees' opinions are valued and helps dispel any perceptions to the contrary.

Another strategy is reframing the discussion on continuous improvement, and this begins by defining the Operation Department's mission. One example is "Providing students with clean, safe and well maintained schools." From there, management can lead staff in evaluating whether particular actions are the best way to achieve the department's mission. If not, new improved actions are a logical step. This method depersonalizes changes and focuses attention on service to students. Furthermore, if management uses examples of personal learning and improvement of practice, this will improve communication with staff and model an example.

One of the strengths of the district culture is the custodians' sense of site ownership. This strong sense of personal ownership, if channeled properly, is highly desirable and results in an intrinsic motivation to take care of the school sites in which the employees are personally invested. Department leadership should see this as a strength to be cultivated. In planning projects at a school site or merely visiting a site, the director of maintenance and operations should check in the site custodians to promote cooperation and involvement. When maintenance or construction projects are planned for a school, it would be beneficial to provide the site custodians with a copy of the proposed schedule.

The most efficient organizational structure with the tightest internal controls will still accomplish only basic tasks if employees are not engaged. However, a healthy culture that promotes involvement can help overcome many external obstacles. Gallup's 2012 Q12 Meta-Analysis on the impacts of employee engagement found that increasing this factor results in higher productivity, lower turnover rates, fewer safety incidents, a reduction in employee theft, less absenteeism, and improved work quality.

In interviews with FCMAT, several department staff members attributed low employee morale to management's recent efforts to improve department services. When the issues were explored

in depth; however, even some of the most frustrated employees expressed a desire to improve the district for the children and conceded that the recent changes were necessary steps toward that goal. The root issue was not change itself, but the perceived violation of norms within the department's long-held culture, which resulted in custodians feeling disrespected. Department management should hold discussions with staff to better understand how to make progress while respecting and improving the organizational culture.

Uniforms

Staff interviews indicated the district's maintenance staff members were not provided with a standard uniform, and while the district distributes identification badges, employees do not wear them regularly. It would benefit the district to supply all department members with a standard uniform. This would help students, staff, and the community readily identify them as district employees. Uniforms also create a unified appearance for the district and foster a sense of unity. Uniforms also increase safety because they act as another layer of protection an employee wears when mixing chemicals or working with machinery. Requiring all district employees to wear identification badges would also improve security.

Maintenance Services

The Maintenance Department's function is to ensure the optimal reliability of buildings and building systems to meet the needs of the organization. The goal is reducing or limiting failures of building components that affect organization operations. The Maintenance Department should be staffed and trained to quickly repair or replace components or systems that include, but are not limited to the following:

- Heating, air conditioning, and ventilation
- Electrical
- Fire Alarm
- Telephony
- Roofing
- Carpentry
- Locksmithing
- Painting

Most maintenance staff members have been with the district for more than 10 years, and many promoted from the custodial department, which is common in school districts. Because of this, the maintenance staff has a significant amount of historical knowledge, but lacks practical experience and journeyman-level training in specific trades. The district recently hired new maintenance staff members from outside the custodial ranks, drawing new ideas and increased skills. During interviews, staff indicated they had enjoyed working for the district; however, several commented on low morale and a lack of trust within the department.

Maintenance Staffing Levels

The Association of Physical Plant Administrators (APPA) has a formula for determining appropriate maintenance staffing based on the desired level of service. The levels of service are as follows:

- Level 1 – Showpiece facility (the highest standard)
- Level 2 – Comprehensive Stewardship (the recommended staffing level for schools)
- Level 3 – Managed Care (work order response time can be lengthy, and facilities' conditions remain stagnant)
- Level 4 – Reactive Maintenance (facilities' conditions deteriorate at an accelerated rate)
- Level 5 – Crisis Response (maintenance staff can only respond to emergencies)

Using the APPA formula for maintenance staffing (<http://www.appa.org/fourcore>), the following table shows the number of full-time equivalent (FTE) positions the district needs for each level of service based on square footage:

Level of Service	Sq. Ft.	688,633	# of FTE
Level 1 - Showpiece Facility	47,220		14.6
Level 2 - Comprehensive Stewardship	67,456		10.2
Level 3 - Managed Care	94,439		7.3
Level 4 - Reactive Maintenance	118,049		5.8
Level 5 - Crisis Response	236,098		2.9

The Maintenance Department has 10 maintenance technicians and one maintenance utility technician. Based on this calculation, the Maintenance Department should provide at least comprehensive stewardship facility service.

A facility with this level of service should typically respond to most service needs in a week, have a well-developed preventive maintenance program, clean/crisp finishes, bright and clean attractive lighting, and well organized.. The district's Maintenance Department does not provide this level of service.

Interviews indicated that two maintenance employees were on leave, and no date was identified for their return. However, based on interviews, a review of the work order system and the lack of expertise by line staff, it is uncertain whether a fully staffed Maintenance Department could maintain the level of care at comprehensive stewardship.

The level of staffing needed will depend on a trained workforce, funding, clear leadership structures, a formal preventive maintenance plan and an adopted level of service that is acceptable to meet the needs of students, staff, and the community. The following two methods are available to determine whether the maintenance department is staffed appropriately are as follows:

- A thorough analysis of Maintenance Department positions by the Personnel Commission or an independent reviewer to determine if the workforce is equipped to perform the essential functions of the job descriptions.
- An extensive, trade-specific training program utilizing local vendors, community colleges, and various online trainings and webinars to ensure maintenance personnel can perform the essential functions of their job descriptions.

Training

A review of training records found that the director of maintenance and operations recently implemented weekly safety trainings. The topics ranged from ladder safety to lock-out-tag-out procedures. This type of procedure is a safety precaution used in industry to prevent machinery from starting or releasing residual energy while maintenance or repairs are taking place. These are appropriate, based on the type of work performed by the Maintenance Department staff.

The EPA requires employees who conduct renovation, repair or painting activities in pre-1978 child-occupied facilities to become lead-safe certified. Firms hired by the school district to perform this type of work must also be certified. The district should provide training based on the EPA's lead renovation, repair and painting rule.

Many of the Maintenance Department staff have only general maintenance training and lack journeyman-level expertise in a specific trade or discipline. Because of this lack of expertise, the director of maintenance and operations has implemented in-house skills training in addition to the weekly safety meetings. Staff who have only slightly greater knowledge of a specific trade

provide skills training. As a result, the district staff will not be able to stay current with building codes, governmental regulations, and industry best practices. Local vendors, community colleges, and various online trainings and webinars would help ensure maintenance personnel have up-to-date knowledge and skills.

Interviews and documents indicate that some maintenance personnel have been promoted to a journeyman-level position without completing an apprenticeship program or receiving specialized training for their respective maintenance trades. The district has relied on on-the-job training for training and experience. When on-the-job training is the sole method of providing work experience, and the senior employees lack journeyman-level experience, new employees will fail to learn the trade secrets and skills necessary to be successful and skilled tradesman. Many skilled trades listed in the maintenance technician job description require licensing or certifications to ensure a minimum level of skill. Trades such as HVAC, electrician and plumbing are inherently dangerous because of exposure to pressurized vessels, high voltage electricity and working in confined spaces or at extreme heights. Based on these conditions, it would be best for the district's Personnel Commission to ensure future candidates for open Maintenance Department positions hold relevant certifications and have adequate work experience and training.

Evaluations

FCMAT's review indicated that employee evaluations are not routinely completed, and some workers have not been evaluated for two years. As a result, those employees have not received formal communication from the director of maintenance and operations about expectations. Performance evaluations are one of the most important methods of communication, providing feedback, recognizing quality performance and establishing expectations for job performance. They also allow for candid conversations regarding poor performance and how it can be improved. Lack of clear communication about department expectations has eroded trust between line staff employees and the district leadership team. Communication could be improved by ensuring the director of maintenance and operations completes annual performance evaluations. Meaningful evaluations cover the entire review period and establish expectations that are in line with the district's mission and goals while aligning directly to the employee's job description.

Routine Restricted Maintenance Account

LEAs are required to establish a routine restricted maintenance account in the general fund if they participate in the state school building programs. During a review of that account, FCMAT found that the district had a significant fund balance at the end of each of the last two fiscal years. While it may be difficult for the district to predict the amount of expenditures that will be required in a given fiscal year, it should develop a budget that is increasingly accurate based on historical expenditures and facilities needs.

This account is dedicated to maintenance of existing facilities. However, during site visits, FCMAT noticed significant repair needs. The administrative/clerical staff should be trained to monitor year to date expenditures, open purchase orders, future expenditure commitments, and projected funding shortfalls. Further, expending all funds in the routine restricted maintenance account each fiscal year would preserve the district's investment in capital facilities.

Preventive Maintenance

The district does not have a formalized preventive maintenance plan. During interviews, staff indicated outside contractors are utilized for routine repairs, and dirty or plugged air-conditioning filters are a common diagnosis. Air filter replacement is a basic preventive-maintenance task. It is evident the Maintenance Department operates in a reactionary mode, with a run-to-fail strategy. This is considered a hands-off approach with the goal of keeping maintenance costs low; however, it will prove costly in the long run. Equipment that fails without warning creates a need for immediate repair, resulting in higher costs. Additionally, equipment that fails during a critical time can create an uncomfortable or potentially unsafe environment for students and staff.

The district should consider implementing a preventive maintenance plan that covers the following building systems:

- Roofs
- HVAC
- Walls
- Electrical
- Gas lines
- Plumbing supply and waste lines
- Fire alarms

The desired outcomes of a scheduled preventive maintenance program include the following:

- Improved operating efficiency
- Fewer breakdowns
- Lower operating costs
- Improved safety
- Improved customer satisfaction
- Decreased disruptions resulting from reactionary maintenance activities

The director of maintenance and operations should develop a written schedule and establish maintenance priorities to effectively utilize maintenance funding and materials. The steps for implementing a preventive maintenance program include the following:

- Create a department policy regarding preventive maintenance and included funding sources.
- Create an inventory database of all facilities and equipment that require routine preventive maintenance and care.
- Create a computer database that stores and displays in chronological order the recommended dates of equipment servicing or potential replacement.
- Establish a financial plan, funding sources and budget codes to track preventive maintenance expenditures.
- Develop a calendar for projects that may need to be contracted. This should be developed in concert with the district's master facility plan.

- Develop a program to annually update the district's facilities and equipment inventory to document the changes that have occurred as a result of maintenance, equipment replacement, modernization, demolition of facilities, or new construction.

Work Order System

The department delivers services through an electronic work order system (My Tech Desk) in which site staff enter the work orders, and the director of maintenance and operations assigns tasks to the appropriate personnel. Before the new director took on this role, work orders were printed, and all maintenance activities were recorded via handwritten documentation. Within the last year, the Maintenance Department issued iPads to document maintenance activities; however, interviews indicated that employees have mixed feelings about their effectiveness. A common concern was a lack of training in the proper use of technology. Additionally, maintenance staff reported that the type of information recorded in the work order system varied widely based on personal preference; some staff members do not make comments while others give detailed descriptions. This type of inconsistency erodes the department's credibility.

During interviews, district staff members stated the work order system generally met district needs, but a few perceived that some work orders are ignored or closed without any maintenance work performed. While reviewing the work order system, staff had a difficult time producing detailed reports showing open work orders or the average turnaround time of work order requests and completion. The work order system appears to be cumbersome, and staff is not fully trained on its functionality. One report indicated the electronic system had open work orders dating back to August 2016. This information confirms that orders have been ignored. The maintenance and operations management staff should develop a method to routinely audit the turnaround time and completion rates of work orders, ensure any outstanding work order requests are addressed in a timely manner and create policy describing the level of detail that should be recorded in the system.

Purchasing

Interviews determined there is an inconsistency in the purchasing procedures considered acceptable. The procurement authority varied and the preapproval process conflicted between written and verbal approval. Additionally, some tradespersons maintained an excessive stock of on-hand material while other trades made purchases on an as-needed basis. These types of erratic purchases do not ensure timely, efficient, or economical procurement of material. It would be helpful to develop a policy that covers acceptable procurement procedures; open and full competition, codes of conduct, procurement authority, cost/price analysis, and recordkeeping.

Inventory

During a site visit to the Maintenance Department, FCMAT observed an excessive amount of inventory of materials and small hand tools. The district has begun inventorying the content of the building and the maintenance vehicles, which is a critical step to determine department efficiency. Without an estimated inventory value or stock report, the district risks purchasing additional equipment or tools that are not needed. For increased efficiency, the district could complete the inventorying process, with the goal of depleting the current stock on hand to a reasonable level.

While maintaining a warehouse of maintenance-related repair parts may appear to be an effective way to save money, the cost of operation, potential for theft, or obsolescence or damage of supplies, can often outweigh the actual savings of bulk rate purchases. The district would benefit from identifying materials and parts that offer the greatest savings to the school sites by stocking them in the warehouse. For other supplies, the district could consider drop (“just-in-time”) shipments. Vendors can offer competitive pricing on common inventory items and deliver them directly to the location in need. These shipments can be more expensive when comparing individual items, but the convenience and availability of goods is greater.

Recommendations

The district should:

1. Eliminate the part-time maintenance coordinator and implement a full-time management-level position with supervisory authority of the Maintenance Department.
2. Build trust between department management and line staff employees.
3. Complete evaluations annually.
4. Provide training for all staff who use district-specific technology (email, the work order system, and the financial system).
5. Request that the Personnel Commission ensure candidates for future open positions within the Maintenance Department hold relevant certifications and possess adequate work experience and training.
6. Request that the Personnel Commission or an independent reviewer evaluate the workforce’s ability to perform the essential functions of their job descriptions.
7. Develop a thorough preventive maintenance schedule of maintenance priorities.
8. Create policy and procedure that identifies the level of detail that should be recorded about maintenance activities within the work order system.
9. Develop a department policy and procedure for procurement of materials and supplies.
10. Complete the inventory of the maintenance facility and vehicles with the goal of depleting the excessive overrun of materials and supplies.
11. Provide uniforms for the maintenance staff and require they be worn in conjunction with district-provided identification badges.
12. Update job descriptions for maintenance and operations staff, aligning them with actual duties.
13. Provide training in asbestos management and lead renovation, repair and painting rule.

14. Train the Maintenance Department staff to monitor expenditures to date, open purchase orders, including future expenditure commitments, and forecast overrun. Further, expending all funds in the routine restricted maintenance account each fiscal year would preserve the district's investment in capital facilities.

Custodial Services

Several custodians have worked in the district for decades, and most have been there more than five years. Custodians reported working as substitutes for years while waiting for a permanent position. Most custodians indicated they came to the district with knowledge of cleaning techniques from the private sector or other school districts, but received no formal training until the last two years. During interviews with FCMAT, most custodians described personal connections to the community, school sites, and school district, with children and grandchildren attending district schools. Without prompting, the custodians expressed a desire to provide students with the cleanest and safest facilities possible. However, most expressed frustration, low morale, and dissatisfaction with their working environment.

The organizational structure of the custodial employees is site-based, with one custodian working a day shift, followed by a night custodian. The middle schools have an additional part-time night custodian. Each custodial team operates individually and is managed by the school site principal.

This organizational structure is problematic for several reasons. School site principals are not trained in or familiar with the nuances of custodial operations and lack the experience needed to assess a custodial employee's effectiveness. Further, evaluating custodial employees is an additional responsibility for principals who are already burdened with staff evaluations and increasing academic performance standards.

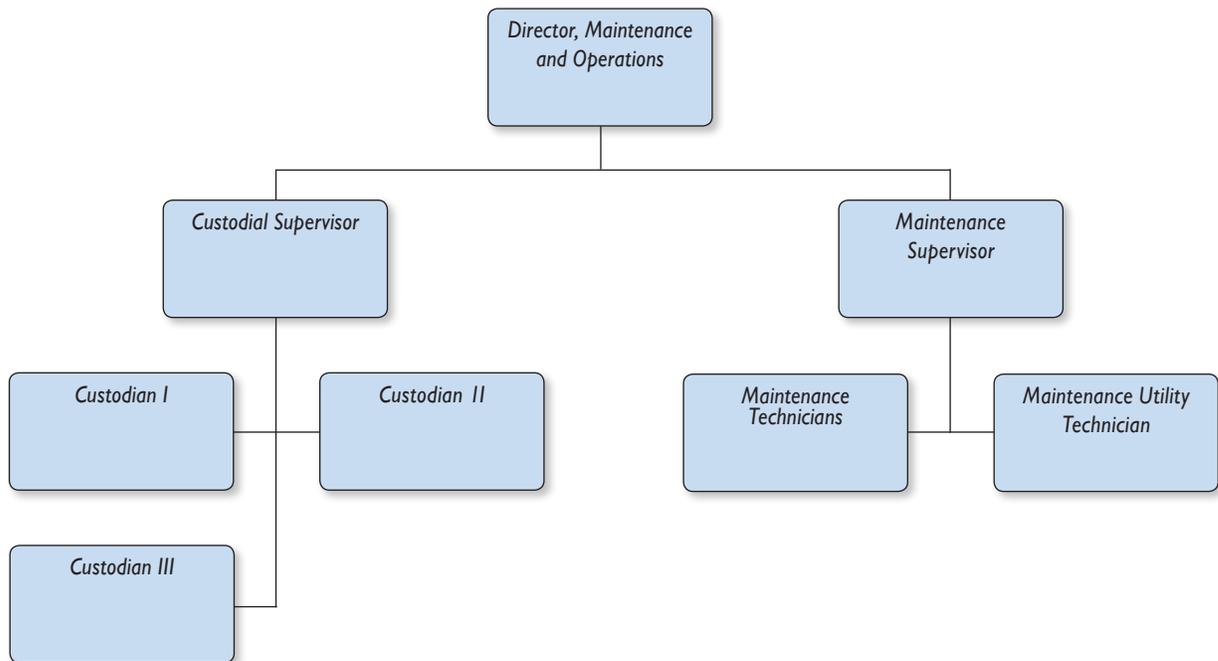
Custodial staff evaluations are not routinely completed across the district. As a result, some ineffective custodial employees avoid progressive discipline and may be transferred to another site. FCMAT observed that some principals evaluate custodians intermittently, and night custodians are not evaluated at all.

When asked who their supervisor is, custodians had a variety of different responses. The question also elicited statements of frustration from custodians who indicated they do not know from day to day who should provide direction. Several custodians described being criticized for following the principal's directions because their supervisor and/or lead disagreed with them. Similarly, custodians shared numerous stories of receiving conflicting direction from several people who have a role in directing and supervising their work. Lack of clarity about what to do or when to do it has created confusion and a stressful working environment for custodial staff.

Because of this disjointed organizational structure, cleaning methods vary from site to site; there are no established districtwide standards or a custodial handbook to disseminate them. The district lacks a central custodial supervisor to establish standardized custodial training or ensure proper procedures are followed districtwide.

Establishing a single position of custodial supervisor would alleviate these issues. This person should be exclusively responsible for directing and evaluating custodial staff. All direction, assignment, training, evaluation, and work requests of custodians should be placed within the chain of command framework of line authority between the custodial supervisor and the custodial staff. Under this scenario, the district's two lead maintenance and operations custodian positions would be eliminated.

Proposed Maintenance and Operations Organizational Structure



Placing all custodians under the supervision of a district-level custodial supervisor will allow for better oversight of tasks and better maintenance of crew assignments and efficiencies. The custodial supervisor could develop a centralized job-training program for custodians, including a specialized training program for new custodians. This position could also standardize and oversee the ordering of supplies and equipment and would be able to efficiently manage all custodial assets. This makes for more efficient distribution and allows the sharing of specialized equipment. The position should be management and be assigned to a swing shift schedule, allowing the supervisor to supervise and evaluate both day and night custodians.

It is a best practice for a custodial supervisor to also consult with site principals when establishing schedules so that their needs are adequately addressed, and disciplinary issues are pursued to a satisfactory end. A custodial supervisor should also work closely with the site principals when evaluating employees and dedicate sufficient time to touring the sites and consulting with the site administrators to ensure their needs are met.

Once the position is established, the custodial supervisor should re-create the daily custodian schedules. The schedules should include time for site work requests, and a clear list of which site requests are appropriate and which are not. This structure enables the principals or teachers to make appropriate requests of the site custodians without the principal assuming the task of supervision. If a custodian is unclear about a task, he or she should seek direction from the supervisor about whether it is an appropriate use of time, or should be submitted as a maintenance work order. Once clear schedules and work parameters are established, the supervisor can work an alternating schedule, between nights and days, to ensure adequate supervision and support for custodial staff.

If a person other than the custodial supervisor provides custodial staff training, it should occur within the framework of the one-supervisor, chain-of-command structure to avoid staff confusion. The custodial supervisor should introduce the training so that it is clear that he or she stands behind it and will hold custodians accountable.

Standardization and Training

Custodial staff members serve 15 school sites, the central kitchen the maintenance/warehouse facility and the district office. Several sites/departments provide some form of direction or supervision to custodial staff, resulting in a lack of standardization throughout the district. When interviewed about cleaning times, procedures, and priorities, custodians provided inconsistent answers that were only minimally related to the standards. Responses about the cleaning time allocated per room ranged from five to 22 minutes. Over one and one-half years, the director of maintenance and operations sought to improve standardization through standardized training and expectations for custodial staff. This effort was unintentionally undermined by the organizational structure, which makes custodians primarily accountable to school site principals. The custodial staff are expected to follow district-set expectations and the site-level evaluation, resulting in stress for them and inconsistent implementation of the training and direction they received.

Although there are no nationwide standards of cleanliness, the U.S. Department of Education has established five levels of cleaning, including the number of square feet that a custodian working an eight-hour shift can reasonably expect to complete:

- Level 1 cleaning results in a “spotless” and germ-free facility as might normally be found in a hospital or corporate suite. At this level, a custodian with proper supplies and tools can clean approximately 10,000 to 11,000 square feet in eight hours.
- Level 2 cleaning is the uppermost standard for most school cleaning and is generally reserved for restrooms, special education areas, kindergarten areas, or food service areas. This service level includes vacuuming or mopping floors daily, and sanitizing all surfaces. A custodian can clean approximately 18,000 to 20,000 square feet in an eight-hour shift at this level.
- Level 3 cleaning is the norm for most school facilities. It is acceptable to most interested parties and does not pose any health issues. Classrooms are cleaned daily, which includes dumping trash and cleaning common area surfaces such as sinks and door handles. Carpets are vacuumed and surfaces used by students are sanitized every other day. A custodian can clean approximately 28,000 to 31,000 square feet in eight hours at this level.
- Level 4 cleaning is not normally acceptable in a school environment. Classrooms are cleaned every other day, carpets vacuumed every third day, and dusting done once a month. A custodian can clean 45,000 to 50,000 square feet in eight hours at this level.
- Level 5 cleaning can rapidly lead to an unhealthy situation. Trash cans may be emptied and carpets vacuumed only weekly. One custodian can clean 85,000 to 90,000 square feet in eight hours at this level.

While the figures above are estimates, they are an excellent starting point for establishing standardized schedules. The actual number of square feet per shift a custodian can clean will also depend on variables such as the type of facilities, school activity schedules, flooring, wall covers, the number of windows, restroom layouts, gym and athletic facilities, and offices. The district is staffed sufficiently to provide a level 2 of cleanliness in areas that require it, and no less than a level 3 everywhere else. However, this is not uniformly realized because of a lack of training and standards, unbalanced workloads and equipment deficiencies.

Jefferson Elementary School District Custodial Staffing Based on CASBO Formula

Schools	ENROLLMENT			CLASSROOMS			BUILDING AREA			TEACHERS/STAFF			RECOMMENDED VS .ACTUAL STAFFING		
	Students	Formula Divisor	FTE	Classroom Equivalents	Formula Divisor	FTE	Sq. Ft.	Formula Divisor	FTE	Teachers/ Staff	Formula Divisor	FTE	CASBO Recommendation	Current Staffing	% of CASBO
Benjamin Franklin	667	325	2.05	35	13	2.69	82,382	18,000	4.58	30	13	2.31	2.907	2.250	77.4%
Daniel Webster	461	325	1.42	22	13	1.69	34,504	18,000	1.92	20	13	1.54	1.642	1.375	83.8%
Fernando Rivera	506	325	1.56	21	13	1.62	51,270	18,000	2.85	29	13	2.23	2.063	2.000	97.0%
Franklin D. Roosevelt	401	325	1.23	24	13	1.85	41,096	18,000	2.28	25	13	1.92	1.822	1.750	96.1%
Garden Village	318	325	0.98	17	13	1.31	28,768	18,000	1.60	15	13	1.15	1.260	1.500	119.1%
General Pershing	n/a	325	n/a	9	13	0.69	9,236	18,000	0.51	n/a	13	n/a	0.603	1.000	165.9%
George Washington	375	325	1.15	24	13	1.85	30,953	18,000	1.72	22	13	1.69	1.603	1.750	109.2%
John F. Kennedy	406	325	1.25	24	13	1.85	40,099	18,000	2.23	23	13	1.77	1.773	2.000	112.8%
M. Pauline Brown	318	325	0.98	19	13	1.46	28,956	18,000	1.61	17	13	1.31	1.339	1.500	112.0%
Marjorie H. Tobias	396	325	1.22	19	13	1.46	34,741	18,000	1.93	18	13	1.38	1.499	1.500	100.1%
Susan B. Anthony	557	325	1.71	27	13	2.08	24,903	18,000	1.38	24	13	1.85	1.755	2.000	114.0%
Thomas Edison	398	325	1.22	20	13	1.54	32,584	18,000	1.81	19	13	1.46	1.509	1.625	107.7%
Thomas R. Pollicita	676	325	2.08	35	13	2.69	78,371	18,000	4.35	35	13	2.69	2.955	2.125	71.9%
Westlake	415	325	1.28	23	13	1.77	32,190	18,000	1.79	22	13	1.69	1.632	1.500	91.9%
Woodrow Wilson	371	325	1.14	18	13	1.38	36,030	18,000	2.00	18	13	1.38	1.478	1.500	101.5%
District Office	n/a	325	n/a	n/a	13	n/a	12,135	18,000	0.67	n/a	13	n/a	0.674	0.500	74.2%
Maint/Warehouse	n/a	325	n/a	n/a	13	n/a	17,302	50,000	0.35	n/a	13	n/a	0.346	0.250	72.2%
TOTAL	6,265		19.28	337	0	25.92	615,520		33.58	317		24.38	26.858	26.125	97.3%

Notes on variations from the CASBO formula:

1. General Pershing School site houses a state preschool program. Student enrollment and staff numbers were excluded from the calculation, because this data would inappropriately skew downward the staffing requirements. Data on square footage and classroom unit equivalents is a more accurate indicator of custodial staffing needs.
2. For the district office student, teacher, and classroom equivalent data is not applicable. The calculation is based on square feet.
3. For the maintenance/warehouse area, student, teacher, and classroom equivalent data is not applicable. An alternative square footage divisor was used in the formula to account of the lesser cleaning needs of this facility.

A higher level of service can be achieved with the current staffing. New written cleaning standards and expectations would better define custodial work. The standards would include daily, weekly and monthly duties and would be developed with the participation of senior management and approval by the school board. It is best to develop these standards before creating work schedules so that the schedules can include adequate time to complete the tasks required. To develop meaningful standards, those involved need to agree on what constitutes an acceptable level of cleanliness. Many school districts have found it useful to memorialize cleanliness standards; protocols for interactions with staff, students and the public; safety, cleaning methods, schedules and training in a custodial handbook. The handbook serves as a reference guide for permanent and substitute custodians. The district's custodial supervisor could create the custodial handbook and train custodial staff on its use. A sample custodial handbook is attached as Appendix A to this report.

Additionally, the supervisor should establish a site inspection form to be used on site walk-throughs with the custodians. This form articulates in a short format the cleaning standards for custodians and holds them accountable for using them. It also builds trust and provides consistency for custodial staff. Knowing the expectations for staff and the leadership reduces stress for staff members and improves employee involvement.

Staffing Levels

Implementing the custodial standards above requires proper staffing levels. The California Association of School Business Officials (CASBO) custodial staffing formula considers the square footage of sites and the number of students, classrooms, and teachers to determine the number of full-time equivalents (FTEs) needed to provide the level 2 standard of cleaning. The following four factors are considered:

- One custodian for every 325 students
- One custodian for every 13 teachers
- One custodian for every 13 classroom units
- One custodian for every 18,000 square feet of educational space

The average of these four factors provides a starting point FTE. Site-specific and district-specific issues may be considered for allocations, which vary from the formula recommendations. This staffing formula is based on industry standards and has been widely used to analyze custodial staffing levels in schools throughout California.

Using information from the district, school accountability report card (SARC) reports, and Ed-Data.org, the custodial staffing was calculated as seen in the chart below. The inclusion of square footages for overhangs and breezeways, which require minimal custodial time, can skew the statistics. These types of factors should be considered in the analysis.

The district allocates one FTE custodian per day shift to every school site, and a percentage of FTE positions across multiple sites to cover night shift cleaning. For example, instead of hiring two half-time employees to clean two smaller schools at night, the district hires one FTE and allocates that person's time to two sites, typically with an afternoon shift (2:30 p.m. to 6:30 p.m.) and an evening shift (7 p.m. to 11 p.m.) with travel in between.

Districtwide, the CASBO formula suggests 26.86 FTE custodians, and the district is staffed with 26.125 FTE, closely matching the formula. However, in the site-by-site breakdown, the “% of CASBO” column shows that some sites are slightly overallocated while others are slightly under-allocated. This is consistent with FCMAT's custodial interviews that indicated a vast disparity among custodian workloads between school sites.

Subsequent to the establishment of standard cleaning procedures, the district should revisit the site-by-site allocation of custodian staffing. For sites that vary from the CASBO formula baseline by more than 10 percent, the district should perform a more extensive analysis, shifting night custodian hours as needed to properly balance the workload.

Equipment

The district's custodians work with old and poor equipment. The vacuums are an average of 11 years old and spew a considerable amount of dust. One custodian showed pictures of floor buffers with patched electrical cords, and another purchased floor care equipment with his personal funds to better accomplish his job. During summer care of vinyl composite flooring, all the custodians shared a single auto-scrubber, which was reported by one custodian to have been purchased with Parent-Teacher Association funds. Besides the inefficiencies that result from having inadequate equipment, custodians feel undervalued.

The district should purchase high-quality equipment for the custodial staff, and build an equipment replacement cycle into the budget. The new equipment should include, at a minimum, new vacuums, new custodial carts, and floor care equipment.

Day custodians are expected to perform light maintenance tasks; however, they lack the proper hand tools for completing these tasks. Some custodians indicated that when hand tools are purchased, they wind up missing. Others bring their own tools.

The district should establish a list of light maintenance tasks that are appropriate for the day custodians. A list of the proper hand tools for completing these tasks should be established and purchased for every school site. Private industry commonly uses a pegboard to track tools. The implements are hung in the custodial closet on a pegboard in a standard format. An outline of each tool is drawn on the pegboard using a paint marker. This establishes the proper place for each tool and shows which is missing.

Recommendations

The district should:

1. Establish a single management position of custodial supervisor.
2. Eliminate the two maintenance and operations lead custodian positions.
3. Ensure all custodial staff direction, assignments, training, and evaluation are solely under the purview of the custodial supervisor.
4. Revise custodian daily schedules to provide time to respond to appropriate teacher and principal requests.
5. Establish clear parameters on the additional supports other than cleaning tasks that custodians can provide to teachers and principals, and when in the schedule these tasks should be completed.
6. Strive to assign all custodian duties within a clear chain-of-command structure.
7. Develop and formally adopt written cleaning standards and expectations for custodial work, including daily, weekly and monthly duties.
8. Establish standards before creating work schedules so that the schedules can include adequate time to complete the tasks required.
9. Direct the custodial supervisor to prepare a custodial handbook that details the district's expectations in the areas listed above.
10. Train custodial staff on the information contained in the custodial handbook.
11. Review each custodial run using the level 2 and level 3 standard, with specific direction on which areas require which level of care to ensure that workloads are evenly distributed among custodial staff.
12. Develop and implement a site inspection tool to reinforce the district's newly-adopted standards and provide a fair mechanism for inspecting and improving work quality.

13. Keep in mind that the Custodial Department is sufficiently staffed to provide level 2 cleanliness in all areas that require it, and consistent level 3 cleaning everywhere else.
14. Consider making shifts in night custodian hour allocations to properly distribute the workload and implement the newly-established cleaning standards.
15. Purchase high-quality equipment for custodial staff, including at least vacuums, carts and floor-care implements.
16. Budget for a proper equipment replacement cycle.
17. Establish a list of light maintenance tasks that are appropriate for custodians to complete, and a list of tools to complete them.
18. Ensure that every custodian has the necessary hand tools.
19. Organize the hand tools with a pegboard.

Grounds Services

The district contracts for grounds services with Frank and Grossman Full Service Landscape Construction based in San Francisco. The district let the contract to Frank and Grossman in 2014 and it expired in 2016, but has continued to use these services on a month-to-month basis according to the terms of the 2014 agreement. Frank and Grossman receives \$7,700 per month or \$92,400 annually for limited grounds services.

The grounds crew consists of two employees working four days a week eight hours a day. Most of the work performed is field mowing, tree and bush trimming, weed whacking and leaf blowing at all of the district's 17 sites. Frank and Grossman trims trees that are less than 15 feet in height, and those that are taller are referred to an arborist. The vendor does not spray herbicides or perform gopher abatement. Due to the drought, the district does not irrigate its landscaped areas; therefore, there is no need to provide irrigation repair services.

Based on a cursory review of the district's grounds, the contract is not sufficient to keep pace with the district's mowing and landscape needs. The director should perform a comprehensive assessment of the district's grounds maintenance needs and develop a new bid specification for grounds services within the district's budgetary constraints and rebid the contract.

Recommendations

The district should:

1. Perform a comprehensive assessment of the district's grounds maintenance needs.
2. Develop a new bid specification for grounds services within the district's budgetary constraints.
3. Rebid the grounds maintenance services contract.

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Appendix A - Sample Custodial Handbook

Sample Custodial Handbook

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Absences/tardiness shall be deemed excessive when, in the judgment of the immediate supervisor, an employee's absence/tardiness results in a loss of efficiency and becomes detrimental to the operation of the Custodial Department. Factors used in this determination include but are not limited to absences on Mondays/Fridays, pre or post holidays, and comparisons to district wide averages.

Employee Dress Code

- The school district believes all employees are role models for students with whom they come in contact during and after school hours. Just as overall attitude and instructional competency contribute to a productive learning environment so do appropriate dress and grooming. All personnel are expected to present a professional impression in their dress and appearance as well as project an acceptable role model image for the students, which is not offensive to community standards or disruptive of the educational process.
- Jeans worn on Spirit Day will only be allowed when worn with school logo shirts.
- Staff shall not wear T-shirts, tank tops, shorts or sweat suits during school hours. The nature of assignments may require exceptions to this policy.

SAMPLE CUSTODIAL SERVICES DEPARTMENT POLICIES AND PROCEDURES

Call In Procedures When Absent Or Late For Work

To report an absence or delay, contact the Custodial Office and the school office. In the event of an unanticipated absence, employees must call and speak directly to their supervisor no later than sixty minutes (60) prior to the start of their shift. If their supervisor is unavailable, the employee must leave a voicemail message and number where they can be reached. The supervisor will then return their call. At times, a substitute custodian may be needed, so early notification is important. An indication of the projected length of absence should be given.

Absence of any kind must be recorded through the “Absence” system. Using your Human Resources issued ID and Pin number, employees must document absences via the phone or the Internet, no later than the day of the absence. Upon returning to work, custodians must provide the school Site Administrator, Manager of Custodial Services, and the Supervisor of Custodial Services the “job number” issued from the “Absence” system.

Responsibility for Keys Issued

Each custodian will be issued keys for the school or schools of their assignment. Keys should not be left unattended or loaned to anyone. If keys are missing at the end of the shift, the custodian should conduct a search of the assigned work areas. If unable to locate the keys, the school Site Administrator, the Supervisor of Custodial Services, the Manager of Custodial Services, and the Manager of Maintenance should be notified immediately. If keys assigned to the employee are lost, the employee will be responsible for all replacement costs to the district.

SAMPLE CUSTODIAL EQUIPMENT OPERATION TRAINING

Back Pack Vacuum

Operating Instructions

1. Preparing vacuum for use:
 - a. Attach flex hose, wand and swivel head to the vacuum canister.
 - b. Make sure that filters are in place (motor filter and exhaust filter).
 - c. Install cloth bag along with a paper filter bag.
 - d. Loosen the shoulder straps and waist belt. In an open area, lift the vacuum by one shoulder strap and slide your free arm into the other strap.
 - e. Fasten the waist belt snugly and make sure the weight is resting conformably on your hips. Note: The back plate is adjustable up or down by removing the four . . screws that attach to the vacuum's body.
 - f. Adjust shoulder straps so that the vacuum is loosely centered and balanced on the waist belt. The shoulder straps should not be supporting the weight of the vacuum; rather they should support the vacuum from tilting backwards or sideways.
 - g. Place the extension cord between the waist belt's strap and padded area to signal you if you have run out of cord while vacuuming.
2. Extension cord care:
 - a. Never stretch the cord tightly between the vacuum and the outlet. A cord that is stretched or pulled will not function properly and creates a danger.
 - b. After vacuuming, unplug the cord at both ends and wind it up loosely, starting from the vacuum out to the plug. Do not wind the cord up by wrapping it around your hand and elbow.
3. Proper vacuuming motions:
 - a. For large open areas, begin with the wand parallel to your body.
 - b. Draw the top of the wand in toward your waist and twist at the waist walking backward or forward (a side to side motion).
 - c. The motion is similar to mopping and keeps the upper body and arms from tiring.
 - d. Avoid bending over or picking up items from floor with vacuum on. Keep back straight and bend at the knee when vacuuming low areas.
4. Ergonomics:
 - a. The weight of the vacuum should be carried on the operator's hips and be evenly distributed.
 - b. The padded waist belt and shoulder straps are adjustable for a custom fit.
 - c. The back plate is ventilated to keep the operator cool.
 - d. The on/off switch is conveniently placed on the waist belt for easy access.

- e. Use the proper attachments for the job. Pro-Team has attachments to perform most jobs without requiring that the operator bend over or get into difficult positions.
5. Caring for your backpack vacuum:
- a. Every time you finish vacuuming, shake out the cloth and micro-lined filter bags.
 - b. Each week, rinse, dry and return the foam/filter diffuser to the bottom of the vacuum below the motor.
 - c. After each shift, wipe the inside and outside of the vacuum with a household cleaning agent.
 - d. Check the filter bags each and every time you start and finish vacuuming. A clogged and dirt filter bag restricts airflow and results in reduced suction and overheating.
 - e. Stop after vacuuming three or four rooms or as needed to shake out the micro-lined bag, especially if it is full.
 - f. Wash and line dry the cloth filter bag as necessary.
 - g. Once a week, remove the motor and exhaust filters and rinse and air dry. Then return to original locations.

Safety Instructions

1. Do not leave any backpack vacuum plugged in when it is not in use. Unplug it from the outlet when the unit is not in use and before servicing.
2. Do not use outdoors or on wet surfaces.
3. Do not use a damaged cord or plug. If the unit is not working, as it should, call the Custodial Supervisor.
4. Do not pull or carry the vacuum by the cord or use the cord as a handle. Do not close a door on the cord or pull the cord around sharp edges or corners. Do not run over the cord. Keep the cord away from heated surfaces.
5. Do not pull on the cord to unplug. Grasp the plug at the outlet and pull.
6. Do not handle the plug or vacuum with wet hands.
7. Do not put any objects into openings.
8. Keep hair, loose clothing, fingers, and all parts of the body away from openings and moving parts. Long hair should not hang over or near the unit.
9. Turn off the unit before unplugging.
10. Do not use without the micro-lined filter bag, cloth filter bag, dome filter, and foam diffuser in place.
11. Do not try to recover any liquid with this vacuum. This vacuum is for dry recovery only.
12. Connect to a properly grounded outlet only.

Floor Scrubbing Machine, Swing Type

Operating Instructions

1. To attach brush, tilt machine back so that the bottom of the machine is exposed. Position the brushes three slots over the three lugs of the drive plate.
2. Adjust handle height to the correct height for the operator.
3. To start machine, hold handle with both hands and depress start lever.

4. This machine is designed to move from side to side. To guide right, raise the handle slightly. The higher the handle is raised, the faster the machine will move to the right. Conversely, to guide left, lower the handle. The more the handle is lowered, the faster the machine will move to the left.
5. When storing your floor machine, always remove the pad and brush.
6. Cord should be held over shoulder to keep the cord out of the path of the machine.

Safety Instructions

1. Never try to attach brush when motor is already engaged.
2. Never turn on machine with handle in locked upright position.
3. Do not leave a plugged in machine unattended.
4. Never plug machine into wall socket that is not grounded.
5. Never plug power cord in with wet hands.
6. Never plug power cord into wall with the balance of the cord wrapped around the handle and switch lever.
7. Never let an inexperienced person operate the machine without proper instructions.
8. Never use an extension cord that is of a lesser gauge wires than that of the machine cord.
9. Never put weights on the floor machine to increase the scrubbing effect.
10. Never run the machine towards the power cord.
11. Never use a cord that is damaged or taped.
12. Never run scrub machine without a scrub pad or brush.
13. When moving machine from room to room, never rest machine in an upright position with pad in place.
14. Always unplug machine before putting drive block on, or working on machine.

SAMPLE CLEANING METHODS

Classroom Cleaning

Most of the custodian's time is spent in the cleaning and caring of classrooms. The key to cleaning classrooms is to establish a procedure that you will follow and divide the cleaning into three parts:

Daily Cleaning Duties:

- Vacuum or sweep the floor
- Dump the wastebaskets
- Empty the pencil sharpener
- Clean sinks if applicable
- Check dispensers for paper and soap supplies
- Check doors and windows for security
- Toilet (if the classroom has restrooms)
- Drinking fountains
- Watch for maintenance items and report to supervisor
- Turn out lights

Weekly Duties:

- Dust horizontal surfaces (Monday)
- Spot clean doors and walls and, if applicable, door glass (Tuesday)
- Clean table tops (Wednesday)
- Clean counters, spot carpets (Thursday)
- Clean whiteboards and trays (Friday)

Special-cleaning Duties on Non-Student Days:

- Bonnet carpets (See Carpet Care Section)
- Clean furniture
- High dust.
- Clean all windows; inside and out.
- Restore floors

Equipment and Material Needed

Equipment:

- Rubber gloves and goggles
- Putty knife
- Dust pan
- Counter brush
- Dust cloth
- Micro-fiber dust cloth
- Sponge or towel rag
- Spray bottle
- Treated dust mop and handle

- Equipment carrier
- Toilet cleaning equipment (see Restroom Care)
- Mop, bucket and wringer
- Vacuum cleaner
- Dry soft clean towel for white board cleaning
- Melamine foam pads to clean furniture and walls
- Small scrub / sponge pad
- Extending duster

Materials:

- Paper products and liquid soap
- Liners
- All-purpose cleaner
- Disinfectant
- Carpet spotter
- Glass cleaner
- Furniture polish
- Cream cleaner or scouring powder (sinks only)
- Graffiti cleaner if needed
- WD40
- Gum remover

Job Method

- Obtain necessary equipment, materials and supplies.
- Proceed to assigned work area.
- Empty wastebasket and pencil sharpener into large plastic bag and place in corridor when full for removal.

Precaution:

- Replace wastebasket to original place. Do not leave on furniture.
- In order to prevent possible injury or exposure to blood borne disease, empty waste paper baskets directly into the bag without handling the contents. Never reach into a trash container.
- If trash has evidence of blood or body fluids, tie the liner off and replace with a new one.
- Always wear rubber gloves when dumping or handling trash.

Sweeping Tile Floors:

- During sweeping operation, carry a putty knife to scrap gum or other foreign materials from the floor.
- Sweep floors with treated dust mop/ or backpack vacuum with proper floor tool, sweeping corners. Move all student chairs and other easily moved furniture.
- Use the counter brush (or broom) and dustpan to pick up all loose sweepings.
- When sweeping/vacuuming the floor, start in the far corner and work toward the door.

- Periodically, shake or brush the dust mop during use as needed. (See Equipment Section for care of dust mop.)
- Spot mop floors as necessary.

Carpeted Floor Care:

- Clean entry mats by vacuuming or shaking out.
- Vacuum the floor with the largest practical tool.
- Make sure to vacuum under counters and bookcases.
- Reset furniture as you vacuum.
- If you see gum, spray with freezing product or alternate gum remover and scrap up with putty knife.
- If carpet develops loose ends, cut them off to prevent running.

If the room has sinks and restrooms, be sure to clean as directed in the Restroom Section of this book.

Dusting, Wiping and Polishing:

Dusting room with a treated cloth

- Dust all horizontal surfaces once a week.
- Make sure to flip the cloth often to have clean cloth to work with
- Start with highest surface that can be reached while standing on the floor and work downward.
- Watch for file cabinets, door panels, louvers, bookshelves, audio and visual equipment.
- Watch for cobwebs.
- Dust above doorframes and all vents.

Damp Wipe or Clean:

- With all-purpose cleaner, spot clean doors and walls.
- Use glass cleaner on all glass surfaces including door glass, mirrors, windows, fire extinguisher fronts and glass desk covers.
- Wear proper protective equipment while using all chemicals.

Cleaning Furniture:

- Use all-purpose cleaner (usually a degreaser), abrasive pad (blue power pad) and some type of toweling. **Note: green scrub pads will scratch some surfaces.**

Clean graffiti daily:

- Clean all desktops weekly.
- Clean tabletops in kindergarten area.
- Do not use graffiti remover unless necessary.
- Rules for removing graffiti:
 - Use all-purpose cleaner (degreaser)
 - Use orange-based natural products
 - Use graffiti remover

Clean Counters:

- Spray counters with disinfectant if close to sink and made of Formica or ceramic tile.
- Wipe with a clean towel.
- If the counters are stained wood, use polish and wipe with dry cloth.
- Use proper protective equipment when working with chemicals.

Carpet Spotting:

- Always use all-purpose spotter first. These spotters will generally remove about 90% of all stains and are safe for most carpets.
- Spray before vacuuming to allow the chemical to work.
- After vacuuming, brush out the spot using the spotting pad with handle.
- If the carpet has more than five to ten spots, you need to schedule a time to bonnet clean the carpet.
- For more information on carpet cleaning, see the Carpet Cleaning Section.

Cleaning White boards and trays:

- First, erase the entire board with a felt eraser (unless the board is marked "Save" or by prior approval of your supervisor).
- In cleaning a white board, erase with a white board eraser, and then wash with glass cleaner and a dry soft towel or a micro fiber cloth. Use caution with white board cleaners, as they tend to be toxic.
- Clean trays moving erasers and pens for complete cleaning.

Cafeteria Cleaning

One area of cleaning that requires special attention is the cleaning of the area(s) used to serve student lunches as well as the food preparation area. These areas need special care because they must be kept clean and sanitary or illness could result. Our goal will always be to exceed local and county regulations. We want all people who use our facilities to feel that using our buildings will not endanger their health.

These buildings are also used for performances; thus, we must do all we can to keep them neat and clean for public use. We want that clean look to be the standard that we live by.

What the Job Entails:

- Set the room up for lunch including putting tables down, putting out trash containers with liners, setting up serving tables if needed, and providing cleaning solution if necessary for use in cleaning tables.
- If the patio area is used, set out trash containers and cleaning solution if necessary.
- Make sure you have a mop bucket, mop and wringer ready for use in case of spills. (These should not be visible to students or placed in the food prep area)
- Be available in the area or let the lunch period monitors know where you

will be in an emergency.

- After each lunch, dump all trash in the proper containers and replace liners if necessary.
- After the last lunch, clean the Multi-Purpose Room.
- Clean patio area.
- Clean serving kitchen and restroom if necessary.
- Clean restroom if there is one in the kitchen.

Equipment Needed:

- Trash containers.
- Putty knife.
- Dust pan and maid's broom.
- Push broom.
- Sponges toweling and bucket of soapy water.
- Large treated dust mop.
- Mop and bucket with down-press wringer.
- Equipment carrier.
- Cleaning pads (white and green).
- Spray bottles.
- Rubber gloves and goggles.
- Bucket with disinfectant.
- Toilet bowl mop and brush.
- Long handled utility brush (nylon)
- Automatic floor cleaning machine.

Supplies and Materials Needed:

- Paper products (paper towels, toilet paper, liquid hand soap and seat covers).
- Multi-purpose cleaner (degreaser).
- Plastic liners (large and small).
- Quaternary disinfectant cleaner
- Glass cleaner.
- Neutral cleaner for floor mopping and cleaning of tables.

Job Method:

- After each serving of food, clear and help clean tables for next group to come in. You may have up to three-lunch groups come in.
- Make sure that the trashcans are emptied for the next group coming in.
- Spot clean the floor and spot mop spills as they happen using a solution of 1 to 64 (2 ounces to the gallon) mixture of neutral cleaner and water.
- After lunch has been served to the last group, begin to clean and put the tables away. If you have in-wall tables, clean the pockets they sit in as needed. Also, check under the tables for milk or juice cartons left by students. If you don't check, when you close the tables, they will be compressed.
- Move the trash containers to the back of the room then sweep the entire room making sure to use the largest dust mop feasible, usually at least 42". If you see a wet spot, go around it. If you get your mop wet, it becomes

very hard to push. Sweep all the debris into a pile using your maid's broom and dustpan. Place in a trash container.

- Mop the entire floor using a well-wrung mop to allow for proper cleaning and quick drying. Note: You clean the floor first to allow for school usage as soon as possible after lunch. (Sites with an auto scrubber should be used as per the manufactures instructions, recommended dilution rates, and speed)
- Empty all trash containers and clean out the trashcans leaving them upside down to dry. You can clean the container with a bucket of degreaser and a long handled brush.
- If the patio is used for lunch, clear the tables first and then clean and sweep the area around the tables.
- Remove the trash and clean as above.
- Hose down with a pressure washer if it is available, hose down tables at the same time the patio area as needed. Note: If you use the patio area for serving food, you will want to seal the concrete with a concrete seal yearly.
- Clean the kitchen starting with the sinks.
- Clean restrooms, if applicable, by the system presented in this book.
- Sweep the floor and remove all trash to the proper container. Note: To conserve space in your large trash receptacle, make sure to break down all boxes so that they take less space. (These are also easy to recycle.)
- Mop floor using the same procedure as on the Multi-Purpose Room.
- Report maintenance and safety issues to your supervisor.

Scrubber, Automatic:

- Flush and clean both tanks after each usage. Clean brushes and pads along with drive block.
- Wash down the exterior and interior of the machine. Clean the squeegee and rim so that the rubber remains soft and flexible.
- Check batteries and clean if needed.
- Make sure the vacuum cover and the rubber gasket have been clean make sure to allow tank to dry before replacing the cover on the vacuum side.

SAMPLE SCHEDULES

Night Custodian (Elementary)

NIGHT SCHEDULE CUSTODIAN SCHEDULE 3:00 P.M. - 11:30 P.M.

The cleaning of restrooms will include:

- Checking dispensers for paper products and liquid hand soap,
- Sweeping floors
- Dumping trash,
- Cleaning sinks
- Cleaning toilets and urinals (**paying close attention to cleaning under the rim and lip of toilets and urinals**),
- Cleaning mirrors, damp mopping floors daily (**paying close attention to borders and behind the doors**),
- Dust weekly.
- See detailed cleaning and serving procedure.

3:00 P.M. - 4:30 P.M	Clean C-1, 2, 3, 4, 5, and rest rooms in that pod
4:30 P.M.- 4:50 P.M.	Clean rest rooms in D pod
4:50 P.M. - 5:00 P.M.	Secure buildings
5:00 P.M. - 5:15 P.M.	Break
5:15 P.M. - 7:00 P.M.	Clean D-1, 2, 3, 4, 5,. And rest rooms in that E Pod
7:00 P.M. - 7:15 P.M.	Break
7:15 P.M. - 9:00 P.M.	Clean E-1, 3, 3, 4, 5,and F-1
9:00 P.M. - 9:15 P.M.	Break
9:15 P.M. – 11:15 P.M.	Clean F-2, 3, 4, 5, G-1, 2, and restrooms in restrooms in F and G
11:15 P.M. – 11:30 P.M.	Secure buildings, restock cart, and put tools away

In cleaning of classrooms, the following will hold true:

Daily:	Sweep or vacuum floors, dump trash, empty pencil sharpener, clean sinks if applicable, check vacuum bag daily, empty disposable vacuum bag when half full
Monday:	Dust all horizontal surfaces including counters.
Tuesday: allows.	Clean chalk trays, windows and doors as time allows.

Wednesday: Clean furniture.

Thursday: Clean sink counters and spot carpets.

Friday: Clean white boards and trays,

Approved: _____
Supervisor Date

I have read, understood and received a true copy of the cleaning schedule outlined above.

Approved: _____
Employee Date

PERFORMANCE INSPECTION GUIDE

Basic Guide

Trash Removal:

- All wastebaskets should be empty, in place, clean and ready for use.
- All trash placed in the dumpster nightly.

Sweeping and Vacuuming Cleaning:

- There should be no dirt left in corners, under desks or behind doors.
- There should be no dirt left where sweepings were picked up.
- There should be no trash or debris under desks, tables and chairs.

Dusting:

- There should be no dust streaks on desks or office equipment.
- Corners and crevices should be free from any dust and dirt.
- There should be no oily spots or smudges on walls or glass.

Damp Wiping:

- Mirrors, window blinds and door glass.

Carpets:

- Carpets should be thoroughly clean and free from dust, dirt and debris.

Wash Basins and Toilets:

- Wash Basins and toilets should be clean and bright.
- Walls near washbasins and toilets should be free from spots and smears including partitions.
- Floor freshly mopped and not left with excess water.
- All metal fixtures wiped dry.
- All dispensers filled.

Cleaning Standards Defined

The purpose of this section is to offer a definition of *“what is clean.”* Once, “what is clean” has been determined then supervisors and employees know what is expected of them. We have attempted to keep things as simple as possible, using only four categories to evaluate work done in several cleaning tasks. The four categories are listed below. How they are used to evaluate the work done in several cleaning tasks follows. You will also find forms at the end of the section meant as an aid for inspecting custodial areas.

1. **Unacceptable.**
2. **Needs Improvement.**
3. **Meets Standards.**
4. **Exceeds Standards.**

Measurement Tools

Classroom, Office, and Library Cleaning Measurement

Sweeping/Dust Mopping/Vacuuming of Hard Surfaces

1. Area not swept, no evidence of effort.
2. Some effort shown, dust and bits of paper still visible.
3. Floor acceptable, accessible areas dust free.
4. Corners clean, furniture moved and area underneath cleaned, room free of visible dust.

Mopping (spot) Classrooms and Offices

1. Full of spots and marks.
2. Some spots cleaned but visible soil remains.
3. Acceptable, looks as if most visible soil has been removed.
4. No visible soil or residue buildup.

Vacuuming

1. Not vacuumed, littered, no evidence of effort.
2. Some effort made, litter and dust still remain.
3. It is teachable, no buildup, most litter gone.
4. No buildup, no visible litter or grass, edges are clean.

Spots and Stains

1. Very heavily stained and spotted, no effort shown.
2. Some effort shown, not all spots removed, some remain.
3. Maximum effort shown, very few spots remain.
4. Spotless, no visible spots or stains.

Whiteboards and Trays

1. Trays loaded with dust, writing still visible.
2. Whiteboard looks cleaned, writing still visible.
3. Acceptable, clean, no visible writing.
4. No ghost writing, trays dust free, boards very clean.

Counters

1. Very dusty, soiled, no evidence of effort shown.
2. Some effort showed not clean, dust and soil very visible in areas.
3. Acceptable, dusted, existing spots extremely light.
4. No visible dust or soil, evidence of extra care to preserve the surface.

Doors

1. Very heavily soiled, no effort of cleaning visible.
2. Some effort shown, but not clean.
3. Acceptable, free of most soil.
4. Spotless, free of all soil and marks.

Furniture

1. Heavily soiled, marks all over, no effort shown.
2. Fingerprints present, some dirt buildup still present, some effort shown.
3. Acceptable, clean but no shine.
4. No visible dust or soil shows that extra effort, shiny.

Glass

1. Glass very dirty, visibility impaired, not cleaned for quite some time.
2. Glass needs cleaning, fingerprints and dust visible.
3. Glass slightly dusty, free of fingerprints, looks fairly clear.
4. Glass dust free, visibility excellent, appears to be recently cleaned.

Sinks

1. Sinks very dirty, ledges show caked soap deposits, bright work dull and dirty, no evidence of effort.
2. Some effort shown, looks dirty, no long term buildup.
3. Sink clean, no buildup, top and bright work clean but no shine.
4. Sink very clean, high luster indicates super effort.

Dispensers

1. Shows no effort, dispensers dirty, empty.
2. Shows some effort, paper low but not empty, dispenser dirty, lever dirty, fingerprints on dispenser.
3. Acceptable, looks clean, dispenser filled.
4. No visible soil, dispenser maintained like new.

Walls

1. No effort shown, heavily soiled.
2. Effort shown, but spots and writing remain on walls.
3. Acceptable, free of most soil and writing.
4. Spotless, free of soil and marks.

Window Sills

1. Heavily soiled or dusty, no effort shown.
2. Some effort shown, dirt still in corners, streaked, most buildup cleaned.
3. Acceptably clean, but no real shine.
4. No visible soil or dust, shiny, extra effort made.

HVAC Vent Covers



1. Very dusty, soiled, no evidence of effort shown.
2. Some effort showed, not clean, dust and soil visible in areas.
3. Acceptable, dusted, existing spots extremely light.
4. No visible soils, evidence of extra effort made to clean the surface.

Restroom Cleaning Measurement

Dispensers

1. No effort showed dispensers dirty, empty.
2. Some effort showed paper low but not empty, dispenser dusty, lever dirty, fingerprints on dispenser.
3. Acceptable, looks clean, dispenser filled.
4. No visible soil, dispenser maintained like new.

Doors

1. Very heavily soiled, no effort at cleaning visible.
2. Handles and bottom of door not cleaned, fingerprints.
3. Acceptable, free of most soil.
4. Spotless, free of all soil and marks.

Floors

1. Littered, soiled, and showing no effort at cleaning, strong odor present.
2. Showing some effort, boards and corners not clean, floor streaked, slight odor.
3. Acceptable, floor mopped evidence of effort, no odor.
4. Spotless, no signs of soil, no odor.

Mirrors

1. Very dirty, soap and water buildup, no effort at cleaning.
2. Most buildup removed, streaks, spots, dusty, shows some effort.
3. Acceptable, free of most soil and spots, some hazing.
4. No visible soil, it has bright shine.

Partitions

1. Heavily soiled, graffiti, dusty.
2. Shows some effort, dust, fingerprints, and some graffiti visible.
3. Partitions generally clean, most graffiti cleaned, recently dusted.
4. Partitions very clean, free of soil, spots, and marks.

Sinks

1. Sinks very dirty, ledges have buildup, bright work dirty, shows no effort.
2. Shows some effort, residue present, bright work looks dull, not cleaned properly.
3. Sinks acceptable, little evidence of dirt in bowl or on surfaces.
4. No visible signs of soil, fixture has high luster.

Toilets

1. Toilet very dirty, scum lines, streaked, stains, deposits under rim, seat dirty, bright work dirty, strong odor.
2. Waterline present, some streaks, some odor, shows some effort.
3. Toilets acceptable, seat and sidewall clean, scup line almost completely gone, very little odor, exterior clean.
4. Toilets very clean, surface has high luster, no odor.

Urinals

1. Urinals very dirty, walls stained and streaked, water deposit and buildup inside rim, has odor, shows no effort at cleaning.
2. Shows some effort, odor present, no long term buildup, and evidence of cleaning present.
3. Acceptable, walls almost streak free, little or no buildup.
4. Very clean, has no streaks or buildup, lustrous look, no odor.

Walls

1. Shows no effort at cleaning, heavily soiled.
2. Some cleaning, but walls still have visible soil and fingerprints.
3. Acceptable, free of most soil and writing.
4. Spotless, free of all soil and markings.

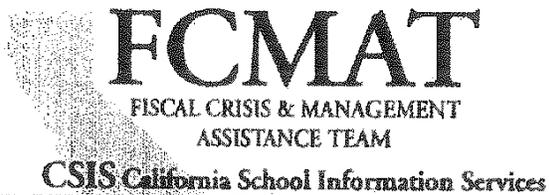
Waste Receptacles

1. Very dirty inside and out, not emptied, no liner.
2. Slightly dirty inside and out, trash emptied but liner dirty.
3. Acceptable, fairly clean inside and out, has clean liner.
4. Spotless, cleaned inside and out, clean liner.

Lockers

1. Very dusty, soiled, no evidence of cleaning.
2. Shows some effort, but dust and soil still visible.
3. Acceptable, dusted, existing spots extremely light.
4. No visible soil or dust, extra effort and care taken to clean surface.

Appendix B - Study Agreement



**FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM
STUDY AGREEMENT
January 31, 2018**

The Fiscal Crisis and Management Assistance Team (FCMAT), hereinafter referred to as the team, and the Jefferson Elementary School District, hereinafter referred to as the district, mutually agree as follows:

1. **BASIS OF AGREEMENT**

The team provides a variety of services to local education agencies (LEAs). The district has requested that the team assign professionals to study specific aspects of the district's operations. These professionals may include staff of the team, county offices of education, the California State Department of Education, school districts, or private contractors. All work shall be performed in accordance with the terms and conditions of this agreement.

In keeping with the provisions of Assembly Bill 1200, the county superintendent will be notified of this agreement between the district and FCMAT and will receive a copy of the final report. The final report will also be published on the FCMAT website.

2. **SCOPE OF THE WORK**

A. **Scope and Objectives of the Study**

1. Conduct an organizational and staffing review of the Maintenance and Operations Department (including grounds and custodial) and make recommendations for improvement, if any.
2. Evaluate the current workflow and distribution of functions in the department and make recommendations for improved efficiency, if any.
3. Review the operational processes and procedures for the department and make recommendations for improved efficiency, if any.

B. Services and Products to be Provided

1. Orientation Meeting - The team will conduct an orientation session at the district to brief district management and supervisory personnel on the team's procedures and the purpose and schedule of the study.
2. On-site Review - The team will conduct an on-site review at the district office and at school sites if necessary.
3. Exit Meeting - The team will hold an exit meeting at the conclusion of the on-site review to inform the district of significant findings and recommendations to that point.
4. Exit Letter – Approximately 10 days after the exit meeting, the team will issue an exit letter briefly memorializing the topics discussed in the exit meeting.
5. Draft Report - Electronic copies of a preliminary draft report will be delivered to the district's administration for review and comment.
6. Final Report - Electronic copies of the final report will be delivered to the district's administration and to the county superintendent following completion of the review. Printed copies are available from FCMAT upon request.
7. Follow-Up Support – If requested by the district within six to 12 months after completion of the study, FCMAT will return to the district at no cost to assess the district's progress in implementing the recommendations included in the report. Progress in implementing the recommendations will be documented to the district in a FCMAT management letter. FCMAT will work with the district on a mutually convenient time to return for follow-up support that is no sooner than eight months and no later than 18 months after completion of the study.

3. PROJECT PERSONNEL

The FCMAT study team may also include:

<i>A. To be determined</i>	<i>FCMAT Staff</i>
<i>B. To be determined</i>	<i>FCMAT Consultant</i>
<i>C. To be determined</i>	<i>FCMAT Consultant</i>

4. PROJECT COSTS

The cost for studies requested pursuant to Education Code (EC) 42127.8(d)(1) shall be as follows:

- A. \$800 per day for each staff member while on site, conducting fieldwork at other locations, presenting reports and participating in meetings. The cost of independent FCMAT consultants will be billed at their actual daily rate for all work performed.
- B. All out-of-pocket expenses, including travel, meals and lodging.
- C. The district will be invoiced at actual costs, with 50% of the estimated cost due

following the completion of the on-site review and the remaining amount due upon the district's acceptance of the final report.

Based on the elements noted in section 2A, the total not-to-exceed cost of the study will be \$21,600.

- D. Any change to the scope will affect the estimate of total cost.

Payments for FCMAT's services are payable to Kern County Superintendent of Schools - Administrative Agent located at 1300 17th Street, City Centre, Bakersfield, CA 93301.

5. RESPONSIBILITIES OF THE DISTRICT

- A. The district will provide office and conference room space during on-site reviews.
- B. The district will provide the following if requested:
1. Policies, regulations and prior reports that address the study scope.
 2. Current or proposed organizational charts.
 3. Current and two prior years' audit reports.
 4. Any documents requested on a supplemental list. Documents requested on the supplemental list should be provided to FCMAT only in electronic format; if only hard copies are available, they should be scanned by the district and sent to FCMAT in electronic format.
 5. Documents should be provided in advance of fieldwork; any delay in the receipt of the requested documents may affect the start date and/or completion date of the project. Upon approval of the signed study agreement, access will be provided to FCMAT's online SharePoint document repository, where the district will upload all requested documents.
- C. The district's administration will review a preliminary draft copy of the report resulting from the study. Any comments regarding the accuracy of the data presented in the report or the practicability of the recommendations will be reviewed with the team prior to completion of the final report.

Pursuant to EC 45125.1(c), representatives of FCMAT will have limited contact with pupils. The district shall take appropriate steps to comply with EC 45125.1(c).

6. PROJECT SCHEDULE

The following schedule outlines the planned completion dates for different phases of the study and will be established upon the receipt of a signed study agreement:

Orientation:	to be determined
Staff Interviews:	to be determined
Exit Meeting:	to be determined
Draft Report Submitted:	to be determined
Final Report Submitted:	to be determined
Board Presentation:	to be determined, if requested

Follow-Up Support: if requested

7. **COMMENCEMENT, TERMINATION AND COMPLETION OF WORK**

FCMAT will begin work as soon as it has assembled an available and appropriate study team consisting of FCMAT staff and independent consultants, taking into consideration other jobs FCMAT has previously undertaken and assignments from the state. The team will work expeditiously to complete its work and deliver its report, subject to the cooperation of the district and any other parties from which, in the team's judgment, it must obtain information. Once the team has completed its fieldwork, it will proceed to prepare a preliminary draft report and a final report. Prior to completion of fieldwork, the district may terminate its request for service and will be responsible for all costs incurred by FCMAT to the date of termination under Section 4 (Project Costs). If the district does not provide written notice of termination prior to completion of fieldwork, the team will complete its work and deliver its report and the district will be responsible for the full costs. The district understands and agrees that FCMAT is a state agency and all FCMAT reports are published on the FCMAT website and made available to interested parties in state government. In the absence of extraordinary circumstances, FCMAT will not withhold preparation, publication and distribution of a report once fieldwork has been completed, and the district shall not request that it do so.

8. **INDEPENDENT CONTRACTOR**

FCMAT is an independent contractor and is not an employee or engaged in any manner with the district. The manner in which FCMAT's services are rendered shall be within its sole control and discretion. FCMAT representatives are not authorized to speak for, represent, or obligate the district in any manner without prior express written authorization from an officer of the district.

9. **INSURANCE**

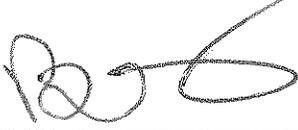
During the term of this agreement, FCMAT shall maintain liability insurance of not less than \$1 million unless otherwise agreed upon in writing by the district, automobile liability insurance in the amount required under California state law, and workers compensation as required under California state law. FCMAT shall provide certificates of insurance, with Jefferson Elementary School District named as additional insured, indicating applicable insurance coverages upon request prior to the commencement of on-site work.

10. **HOLD HARMLESS**

FCMAT shall hold the district, its board, officers, agents and employees harmless from all suits, claims and liabilities resulting from negligent acts or omissions of its board, officers, agents and employees undertaken under this agreement. Conversely, the district shall hold FCMAT, its board, officers, agents and employees harmless from all suits, claims and liabilities resulting from negligent acts or omissions of its board, officers, agents and employees undertaken under this agreement.

11. **CONTACT PERSON**

Name: Bill Heath, Director M/O Construction
Telephone: (650) 991-1346
E-mail: bheath@jeffersonesd.org



Bernie Vidales, Superintendent
Jefferson Elementary School District

Feb 1, 2018

Date



Michael H. Fine,
Chief Executive Officer
Fiscal Crisis and Management Assistance Team

January 31, 2018

Date