

BERKELEY UNIFIED SCHOOL DISTRICT

TO: Donald Evans, Ed.D., Superintendent
FROM: Timothy White, Executive Director of Facilities
DATE: June 28, 2017
SUBJECT: Approval of the 2017/18 Measure H Annual Plan

BACKGROUND INFORMATION

One of the key tasks of the Facilities Safety and Maintenance Oversight Committee (FSMOC) is to consider the Annual Plan. The measure states,

“An expenditure plan (the “Annual Plan”) shall be developed annually by District staff with input from the Facilities Safety and Maintenance Oversight Committee. The Annual Plan will recommend expenditures of the tax proceeds that are consistent with the intent of the Measure. The assumptions associated with the recommended expenditures shall be included in the Annual Plan. The Plan shall be presented for Board action each year in conjunction with the District’s annual budget adoption process. To facilitate public discussion, the recommended Annual Plan shall be distributed to the Facilities Maintenance and Security Advisory Committee and made available for public review two week prior to Board action.”

In the past, the following reports were approved:

Date	Type	Period Covered
October 17, 2001	Strategic Plan	
January 9, 2002	Annual Plan	7/1/01 – 6/30/03
October 1, 2003	Annual Plan	7/1/03 – 6/30/04
October 20, 2004	Annual Plan	7/1/04 – 6/30/05
November 16, 2005	Annual Plan	7/1/05 – 6/30/06
June 28, 2006	Annual Plan	7/1/06 – 6/30/07
June 27, 2007	Annual Plan	7/1/07 – 6/30/08
June 25, 2008	Annual Plan	7/1/08 – 6/30/09
June 24, 2009	Annual Plan	7/1/09 – 6/30/10
June 23, 2010	Annual Plan	7/1/10 – 6/30/11
June 22, 2011	Annual Plan	7/1/11 – 6/30/12
June 20, 2012	Annual Plan	7/1/12 – 6/30/13
June 26, 2013	Annual Plan	7/1/13 – 6/30/14
June 11, 2014	Annual Plan	7/1/14 – 6/30/15
June 25, 2015	Annual Plan	7/1/15 – 6/30/16
June 29, 2016	Annual Plan	7/1/16 – 6/30/17

This is the fifth Measure H Plan.

Staff published the proposed plan on June 13th, in keeping with the requirements of the Measure. The Plan has been available at the Administration building and at Plant Operations for the past two weeks.

POLICY/CODE

Measure H, the Berkeley Public Schools Facilities Safety and Maintenance Act of 2010.

FISCAL IMPACT

The fiscal impact is contained in the Plan; all costs will be paid from Measure H.

STAFF RECOMMENDATION

Approve the Measure H 2017/18 Annual Plan.

BERKELEY UNIFIED SCHOOL DISTRICT

MAINTENANCE AND GROUNDS DEPARTMENT MEASURE H ANNUAL PLAN

2017-2018

Submitted by Timothy White, Executive Director of Facilities and
Stephen Collins, Facilities Maintenance Manager

INTRODUCTION

This document is the 2018 Annual Plan required by the Berkeley Schools Facilities Safety and Maintenance Act of 2010 (Measure H). The Annual Plan has generally been developed with input from the Facilities Safety and Maintenance Oversight Committee (FSMOC). The Committee has met several times this year. The Maintenance Manager serves as the liaison to the Committee. The Plan will be presented in conjunction with the District's annual budget as required by the measure. Reports on progress will be presented to the FSMOC and the Board quarterly and financial updates will be presented at the time of the District's interim reports (by December 15th and March 15th). A proposed staffing plan will be shared with the Committee to help develop the 2018 Annual Plan.

This Plan includes this introduction, states responsibilities and comments, lists accomplishments, includes planned goals, defines the budget, lists support from other funds, details historical staffing and provides a multi-year budget projection.

The Berkeley Schools Facilities Safety and Maintenance Act of 2010 (Measure H) states its purpose:

“The revenues raised by this Measure, the “Berkeley Schools Facilities Safety and Maintenance Act of 2010”, will improve safety and essential building maintenance and grounds operations of all Berkeley Unified School District (“District”) facilities.”

This is the fifth Measure H Plan.

BUSD has 23 sites and over 100 acres of land. Of those 23 sites, 16 are K-12 schools, one is an Adult school, three are preschools, one is our Transportation department, one is our Plant Operations department and one is a multi-use site with our Administration facility and our charter school. The majority of the schools were constructed throughout the last century, being built mostly in the 1950's, but have been upgraded since that time. Six schools were constructed over the past 20 years along with major new buildings added to Berkeley High, Longfellow, King and Jefferson. The District also constructed a new Transportation facility. The District has a significant amount of built area for the number of students.

The Board approved placing a measure before the voters in June 2010 and the citizens approved that measure in November 2010. The Board reviewed a “*Plan for School Maintenance and Reconstruction in the Coming Decade*”, the “blue book” on September 15, 2010. That document helped inform voters about the maintenance special tax.

The first Annual Plan was approved by the Board for Measure BB and the Facilities Division on October 17, 2001. This strategic plan focused on improving BUSD maintenance department services and increasing support staff. The eighteen-month expenditure plan, adopted on January 9, 2002, detailed nine areas of focus: maintenance, custodial, utilities, construction, community use of facilities, plant security, hazardous waste management, disaster preparedness, and reporting.

Subsequent Annual Plans have been approved on: October 1, 2003; October 20, 2004; November 16, 2005; June 28, 2006; June 27, 2007; June 25, 2008; June 24, 2009; June 23, 2010; June 22, 2011; June 20, 2012; June 26, 2013, June 11, 2014, June 25, 2015 and June 29, 2016.

RESPONSIBILITIES AND COMMENTS

MEASURE H RESPONSIBILITY:

Measure H's primary responsibility is to support the maintenance and grounds needs of the District. Expenditures associated with Measure H are:

- Salaries and benefits of maintenance and grounds personnel including office administration;
- Supplies needed to support the work of the department;
- The cost to purchase and repair vehicles and other equipment;
- Building equipment and system repairs, such as HVAC and boiler equipment, lighting, plumbing, phone lines, fire sprinklers, fire alarms and similar systems;
- Minor structural repairs, such as window and door replacement, roofing and wall repairs, and flooring replacement;
- Irrigation repairs and landscape restoration;
- Exterior repairs to asphalt play surfaces and concrete walkways, fencing, and playground equipment; and,
- Cosmetic improvements, including painting and replacement of window coverings and graffiti removal.

COMMITTEE COMMENTS:

- The Committee is very interested in green and sustainable initiatives and would like to see the Maintenance Department focus resources on such projects.
- The Committee noted challenges with meeting last years' staff goals and would like to identify ways in which we can assist in having them met in the upcoming year.

GOALS AND ACCOMPLISHMENTS CONTAINED IN THE 2017 PLAN

Executive Director of Facilities

1. In 2015-16, I am completing Phase I of the District's new Facilities Master Plan. It is my goal in the 2016-17 school year to begin and complete Phase II. I have not made much progress on this item this year. **This goal will continue as a goal for next year.**
2. In the State of California, school districts can legally charge developers fees as a means to off-set the impact that development has on the school district. Historically, BUSD has not charged these fees to developers. My goal is to establish a new revenue source for the District via developer fees. **I have completed the process of getting approval to charge developer fees. The next step is to create a policy of how to charge and collect the fees. This goal will be about 75% complete this year and will continue as a goal for next year.**

Maintenance and Grounds Manager:

1. This year, it is expected that five of the departments' leadership positions will change hands due to retirements. The new leaders may come from internal promotions or from outside of the District. It is my goal to meet weekly with the new leadership team and spend whatever time needed to train and integrate them into the department as leaders; **Four of the five positions have new leaders in them. We have been meeting on a weekly basis and the new leaders are integrating into our system very well. This goal has been fully implemented.**
2. Finalize the grounds maintenance plan for each site. By October 31, 2016, we plan to have aerial maps for each site for improved planning. By December 31, 2016, we will finalize the site work plans. By March 15, 2017, we will meet with each site administrator to present the draft plan and invite input. By April 30, 2017, we will present the final plan; **Due to turnover and vacancies, we have not made much progress on this goal. I expect to be about 30% complete with this goal by June 30. This goal will continue into next year.**
3. Identify, evaluate and prioritize green and sustainable initiatives within the District. It is my goal to create a prioritized list by December 31, 2016 and to develop a plan and begin to implement top priorities by June 30, 2017. **This**

goal is about 50% complete. I expect to be about 80% complete by June 30, 2017. Implementation of this goal will go into next year as a goal.

Operations Manager:

- 1. Provide leadership, training and support to the new Facilities After Hours Operations Supervisor to ensure success in the position; This goal has come along very well. The new Supervisor has been trained and supported and is doing well. Although training and support will be ongoing, this goal will be considered complete by June 30, 2017**
- 2. Revise the custodial formula to reflect the District's small sites and unique programs; This goal is currently about 70% complete. We expect this goal to be 100% complete by June 30, 2017.**
- 3. Provide training for staff on the latest cleaning procedures and computer programs to better prepare them for advancement opportunities; It has been more challenging than expected to find a program that meets our needs. This goal will only be about 30% complete by June 30, 2017. This goal will continue into next year.**

GOALS OF THE DEPARTMENT FOR 2018

The following is a list of goals for the maintenance, grounds, operations and construction areas:

Director:

1. On February 8, 2017 the Board held a public hearing and voted to adopt the School Justification Study that allows the District to charge a school facility fee for all residential development of more than 500 square feet and for new commercial and industrial development. My goal is to implement the collection of the fee.
2. The District is very interested in gender inclusive facilities. My goal is to work with a consultant to create studies to understand the overall needs for gender inclusive facilities.

Maintenance and Grounds Manager:

- 1 I plan to finalize the grounds plans for each site. By October 31, 2017, we plan to have aerial maps for each site for improved planning. By December 31, 2017, we will meet with each site administrator to present the draft plan and invite input. By January 30, 2018, we will present the final plan.
- 2 It is my goal to begin to implement top green and sustainable priorities by this year. I plan to install hand dryers in three elementary schools and bottle fillers at five.

Operations Manager:

- 1 This year I plan to train custodians on the use of computers. This will open the door for more possibilities for technical online trainings and give custodians a valuable skill that may allow them promotion opportunities in the future.
- 2 Create a training program for security personal. I want to have a program to train staff how to respond to fire and burglar alarms, how to secure a site when needed and how to provide good customer service.

MEASURE BB BUDGET

STAFFING

Managers	1.64 permanent
Supervisors	2 permanent
Administrative Coordinators	2.15 permanent
Trade Leads	2 permanent, 1 vacant
Security Engineer	1 permanent
Maintenance Engineers	12 permanent
Trade Specific	1 permanent
Maintenance Technician	3 permanent
General Maintenance	2 permanent
Grounds Lead Worker	3 permanent
Grounds Gardener	6 permanent
Network Technician	0.40 permanent
Vehicle Mechanics	0.45 permanent
Security Personnel	1 permanent (0.5 FTE of two positions)
Custodial Maintenance Differentials	0.85 permanent

TOTAL 41.49 FTE

This staff model reflects the elimination of one Maintenance Technician FTE.

We plan to hire two additional gardeners for an extended period this year.

The projected cost of staffing, including benefits, for 2017/18 is \$4,017,363. This includes the cost of limited term (\$50,000) and overtime (\$110,000).

Maintenance Supplies

Supplies and hand tools will be purchased to support required repairs and maintenance work. The cost to fuel department vehicles is included in this budget.

The projected cost for supplies for 2017/18 is \$484,000.

Contracted Services

The Maintenance Department will contract for various specialized services that require inspections, certifications and repairs by providers with specific licensing or specialty skills. Other contracted services will be provided in areas of work not normally performed by existing staff, or when the required expertise is not available in-house. Such services include:

- Elevator inspections and minor repairs (estimated at \$80,000);
- Annual boiler inspections (estimated at \$80,000);
- Life Safety System testing and repair, including fire alarm and sprinkler systems (estimated at \$80,000);

- Tree removal and pruning (estimated at \$30,000);
- Disposal of hazardous waste/lamps and ballasts (estimated at \$30,000);
- Floor repairs/replacements (estimated at \$30,000);
- General mechanical repairs (estimated at \$40,000);
- Heating control repair and adjustment (estimated at \$40,000);
- Emergency plumbing (estimated at \$30,000);
- Waterproofing and roofing services (estimated at \$30,000);
- Wood floor refinishing (estimated at \$25,000);
- Infrared scanning of electrical panels;
- Roof repair;
- Window repair and replacement;
- Replacement of blinds and shades;
- Fence repairs; and,
- Interfund charges, including the cost for vehicle repair parts purchased by the Transportation Department to fix maintenance and grounds vehicles.

The projected cost for on-going contracted services is \$1,100,000.

Vehicle and Equipment Purchase

We plan to replace one vehicle and buy one new field maintenance vehicle this year.

The projected cost for Vehicle/Equipment Purchase is \$65,000.

Indirect Cost Rate

Indirect costs are those needed to provide District-wide professional services including insurance, payroll, personnel, purchasing, accounting and other incidental functions related to the District's business operation. The indirect cost rate to be charged for the Fiscal Year is 6.41%.

The projected cost for indirect support for 2017/18 is \$337,000.

Projected Overall Totals for 2017-2018

Revenues

Measure H Funding for 2017/18:	\$5,936,592
Maintenance Reimbursement 2017/18:	79,000
Projected Interest from H for 2017/18:	<u>1,000</u>
Total Projected Revenues for Maintenance 2017/18:	\$6,016,592

Expenditures

Salaries/Benefits/Limited Term/Overtime:	\$4,017,502
Supplies:	484,000
Contracted Services:	1,100,000
Vehicle and Equipment:	65,000
Indirect Costs Rates:	<u>337,000</u>
Projected Expenditures by Maintenance for 2016/17:	\$6,003,502

Projected Surplus/ (Deficit) **\$ 13,090**

2017/18 Projected Ending Fund Balance: **\$ 845,553**

Anticipated carryover from 2016/17 to 2017/18: **\$ 832,000**

Notes:

- 1. If an emergency of any size occurs, it will decrease the projected carryover as we are not budgeting for any large emergencies.**
- 2. The 3% Reserve for Economic Uncertainties is approximately \$180,000**

SUPPORT FROM OTHER FUNDS

The Bond, State School Building, Deferred Maintenance and Prop 39 Funds

These funds replace systems when they fail or are about to fail. The Deferred Maintenance Funds have been swept and no new funding is available. The bond continues to upgrade selected systems. As a system ages, it places a greater burden on the Maintenance Department. Proposition 39 funds are temporary and will be used to replace certain systems over the next three years. The following project is planned for the next year, to be funded by Proposition 39: Replace all exterior lighting with new LEDs.