

# Berkeley Unified School District

**TO:** Eneka Morthel Ford, Ed.D., Superintendent  
**FROM:** John Calise, Executive Director of Facilities  
**DATE:** June 14, 2023  
**SUBJECT:** Approval of the 2023/24 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 weeks 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
June 28, 2017	Annual Plan	7/1/17 – 6/30/18
June 27, 2018	Annual Plan	7/1/18 – 6/30/19
December 11, 2019	Annual Plan	7/1/19 – 6/30/20
July 15, 2020	Annual Plan	7/1/20 - 6/30/21
June 23, 2021	Annual Plan	7/1/21 - 6/30/22

June 14, 2022

Annual Plan

7/1/22 - 6/30/23

This is the eleventh Measure H Plan and the fourth plan of the new 2020 Measure H.

**POLICY/CODE**

Measure H, the Berkeley Public Schools Facilities Safety and Maintenance Act of 2020.

**FISCAL IMPACT**

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

**STAFF RECOMMENDATION**

Approve the Measure H 2023/24 Annual Plan.

**BERKELEY UNIFIED SCHOOL DISTRICT**

**MAINTENANCE AND GROUNDS DEPARTMENT  
MEASURE H  
ANNUAL PLAN**

**2023-2024**

Submitted by John Calise Executive Director of Facilities and  
Stephen Collins, Facilities Maintenance Manager

## INTRODUCTION

This document is the 2024 Annual Plan required by the Berkeley Schools Facilities Safety and Maintenance Act of 2020 (Measure H). The Annual Plan has generally been developed with input from the Facilities Safety and Maintenance Oversight Committee (FSMOC). The committee is newly formed and has met twice 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 15<sup>th</sup> and March 15<sup>th</sup>). A proposed staffing plan will be shared with the Committee to help develop the 2024 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 2020 (Measure H) states its purpose:

*“The revenues raised by this Measure, the “Berkeley Schools Facilities Safety and Maintenance Act of 2020”, will improve safety and essential building maintenance and grounds operations of all Berkeley Unified School District (“District”) facilities.”*

This is the eleventh Measure H Plan.

BUSD has 23 sites and over 100 acres of land. Of those 23 sites, 15 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, our Boardroom, our Visual and Performing Arts program offices and Oxford Elementary 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 25 years along with major new buildings added to Berkeley High, Longfellow, King and Ruth Acty. 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 November 2019 and the citizens approved that measure in March of 2020. The Board reviewed a “*Plan for School Maintenance and Reconstruction in the Coming Decade*”, the “blue book”, on November 20, 2020. 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, June 29, 2016, June 28, 2017, June 27, 2018, December 11, 2019, July 15, 2020, June 23, 2021 and June 14, 2022

## **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 FSMOC was not able to meet with a quorum and therefore did not have input into this plan.

# GOALS AND ACCOMPLISHMENTS CONTAINED IN THE 2022 PLAN

## Executive Director of Facilities

1. The City of Berkeley Voters recently approved funding based on a Facilities Needs Assessment and Masterplan. I expect to work with all stakeholders to create meaningful projects that promote equity and will provide safe environments for our students throughout the District. **This goal is about 50% complete and will continue into next year.**
2. The Facilities Division will continue to collaborate with Educational Services, Maintenance, Operations and Nutrition Services in the planning and development of our projects to enhance the quality of our overall school environments. **This goal is about 50% complete and will continue into next year.**
3. With the passage of the voter-approved measures, the Facilities Division will continue to prioritize projects to incorporate sustainable features when possible and feasible. In June of 2020, the Governing Board authorized the expansion of the District's solar generation and other sustainability and resiliency efforts. The Facilities Division is committed to prioritizing these projects for the implementation of the Bond program. **This goal is 70% complete and will continue into next year.**

## Maintenance and Grounds Manager:

1. As part of our green and sustainable efforts, I plan to install three more smart irrigation controllers this year. **This goal is 100% complete.**
2. With Covid 19 we are modifying our task lists to include more items related to health and safety, such as touchless faucets. My goal is to research and implement best practices for this purpose. **This goal is 100% complete.**

## Operations Manager:

1. My plan is to institute the green cleaning products at each school site after the use of all old products in the 2021 school year. **This goal is about 70% complete. We have stocked all schools with the new green cleaning products. There is still some inventory of the old products to be used up.**
2. We will provide effective and efficient cleaning procedures to disinfect schools due to Covid-19. We will provide clean and safe school campuses. **This goal is 100% complete.**

3. I plan to complete the process to fill all vacant custodial positions and increase substitute custodial positions. **This goal is 90% complete. We have one custodial vacancy and are pushing to have it filled soon.**
4. I plan to hire additional security personnel to provide adequate security throughout the school district. **This goal is complete. One security position was added and is filled.**

## **GOALS OF THE DEPARTMENT FOR 2023**

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

Executive Director:

1. I plan to improve our commitment to outreach and engagement with the community at large regarding projects and project schedules by increasing mailers, digital notifications, project boards and other mediums used for announcements.
2. In 2023 we updated all of the District's construction and security standards. I plan to incorporate these new standards and the many sustainable features within them. The Facilities Division is committed to prioritizing these projects for the implementation within the Bond program.

Maintenance and Grounds Manager:

1. This year we are in the unique situation of having a low fund balance. My primary goal is to refocus the department's efforts to maintain existing older equipment and systems as opposed to replacement. As part of this effort we will perform more repair work and contract out less.
2. We will have our new energy tracking software up and running at the beginning of the new year. I plan to benchmark all of our sites back to 2019 in order to show how much energy we are saving with all of the energy efficiency projects that we have performed.

Operations Manager:

1. This year I plan to work with HR to fill all vacant custodial positions so the department can be fully staffed.
2. I plan to continue to replace old custodial equipment and train all custodians on the new equipment.

3. I plan to continue to work with the district’s sustainability coordinator to ensure that all custodians are supporting the goals of composting and recycling.

## **MEASURE H BUDGET**

### **STAFFING**

Managers	1.64 permanent
Supervisors	3 permanent
Administrative Assistant III	2.15 permanent
Sustainability Program Coordinator	1 permanent
Lead Maintenance Engineers	3 permanent
Security Engineer	1 permanent
Maintenance Engineers	12 permanent
Telecommunications Specialist	1 permanent
Maintenance Technician	2 permanent, 1 vacant
General Maintenance	2 permanent
Grounds Lead Worker	2 permanent, 1 vacant
Grounds Gardener	7 permanent
Network Technician	0.40 permanent
Vehicle Mechanics	0.45 permanent (0.15 FTE of three positions)
Security Personnel	3 permanent
Custodial Services .05 per Custodian II	0.75 permanent

**TOTAL** 44.39 FTE

**The projected cost of staffing, including benefits, for 2023/24 is \$5,843,951. This includes the cost of limited term and overtime.**



### 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 2022/23 is \$366,000.**

### Contracted Services (Ongoing)

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. In the list below we notate services that cost \$25,000 or more as part of our commitment to transparency around larger expenses. This list is not exhaustive:

- Elevator inspections and minor repairs (estimated at \$150,000);
- Annual boiler inspections (estimated at \$110,000);
- Life Safety System testing and repair, including fire alarm and sprinkler systems (estimated at \$100,000);
- Tree removal and pruning (estimated at \$30,000);
- Disposal of hazardous waste/lamps and ballasts (estimated at \$40,000);
- Floor repairs/replacements (estimated at \$30,000);
- General mechanical repairs (estimated at \$40,000);
- Heating control repair and adjustment (estimated at \$60,000);
- General plumbing (estimated at \$30,000);
- Emergency drain cleaning (estimated at \$25,000)
- Waterproofing and roofing services (estimated at \$30,000);
- Wood floor refinishing (estimated at \$25,000);

Less than \$25k:

- Service and monitoring of photovoltaic systems
- Infrared scanning of electrical panels;
- 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 \$1,153,000.**

### Vehicle and Equipment Purchase

We plan to replace two vehicles this year.

**The projected cost for Vehicle/Equipment Purchase is \$50,000.**

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 5.42%.

**The projected cost for indirect support for 2023/24 is \$462,000.**

Projected Overall Totals for 2023-2024

**Revenues**

<b>Measure H Funding for 2023/24:</b>	<b>\$8,040,840.00</b>
<b>Projected Interest from H for 2023/24:</b>	<b><u>2,000.00</u></b>
<b>Total Projected Income for Maintenance 2023/24:</b>	<b>\$8,042,840.00</b>

**Expenses Related to Revenue**

<b>County Collection fees</b>	<b>\$136,950.00</b>
<b>City of Berkeley fees</b>	<b>\$30,000.00</b>
<b>Audit and Legal Expense</b>	<b><u>\$8,000.00</u></b>
<b>Total Expenses</b>	<b>\$174,950.00</b>
<b>Net Revenue</b>	<b>\$7,867,890</b>

**Expenditures**

<b>Salaries/Benefits/Limited Term/Overtime:</b>	<b>\$5,843,951.00</b>
<b>Supplies:</b>	<b>366,000.00</b>
<b>Contracted Services:</b>	<b>1,153,000.00</b>
<b>Vehicle and Equipment:</b>	<b>50,000.00</b>
<b>Indirect Costs Rates:</b>	<b><u>462,000.00</u></b>
<b>Projected Expenditures by Maintenance for 2023/24:</b>	<b>\$7,874,951.00</b>

**Excess (Deficiency) of Revenue Over Expenditures** **(\$7,061)**

**Beginning Fund Balance(22/23 carryover):** **\$387,807.00**  
**Excess (Deficiency) of Revenue Over Expenditures** **(\$7,061)**

**2023/24 Projected Ending Fund Balance:**

**\$380,746.00**

**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. Revenue is based on a 4.9% COLA**
- 3. Indirect cost rate is 6.44% of expenses**
- 4. Salaries are based on step and column and a negotiated 6% salary increase**
- 5. The 3% Reserve for Economic Uncertainties is approximately \$240,552.00**

**SUPPORT FROM OTHER FUNDS**

The Bond, State School Building, Deferred Maintenance Funds and PG&E OBF

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. We have received approval for PG&E's On Bill Financing program. We will receive a \$6.9m zero interest loan that gets paid back on the utility bill over ten years. As a system ages, it places a greater burden on the Maintenance Department. The following projects are planned for the next year:

1. Exterior paint for Thousand Oaks Elementary School;
2. Building envelope repairs to include exterior paint and wood trim at John Muir;
3. District-wide energy project to include the modernization of the BHS G&H building air handlers, the replacement of lighting, energy management controls, etc;
4. Major modernization of the Community Theater;
5. Replacement of the fire alarm at Malcolm X;
6. Equipment and infrastructure upgrades of the BHS Natatorium;
7. Improvements to the Adult School;
8. Modernization and CTE Project at Berkeley Technical Academy;