Berkeley Unified School District

TO: Enikia Ford Morthel, M.Ed., Superintendent
FROM: John Calise, Assistant Superintendent of Facilities
DATE: May 21, 2025
SUBJECT: Approval of the 2026/27 Measure H Facilities Safety and Maintenance 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
June 14, 2023	Annual Plan	7/1/23 - 6/30/24
June 12, 2024	Annual Plan	7/1/24 - 6/30/25
May 21, 2025	Annual Plan	7/1/25 - 6/30/26

This is the seventeenth Measure H Plan and the seventh plan of the 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 2026/27 Annual Plan.

BERKELEY UNIFIED SCHOOL DISTRICT

MAINTENANCE AND GROUNDS DEPARTMENT
MEASURE H
ANNUAL PLAN

2026-2027

Submitted by John Calise, Assistant Superintendent of Facilities and
Stephen Collins, Facilities Maintenance Manager

INTRODUCTION

This document is the 2027 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 has met four 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 2027 Annual Plan.

This Plan includes this introduction, states responsibilities and comments, 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 seventeenth Measure H Plan.

BUSD has 26 sites and over 100 acres of land. Of those 26 sites, 15 are K-12 schools, one is an Adult school, three are preschools, one is our Transportation department, one is our Facilities offices, one is the future home of our Plant Operations department, one is the interim site for our Plant Operations, one is the interim site for multiple departments that were displaced by the temporary closure of one of our middle schools, 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 Middle, King Middle 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, June 14, 2022, June 14, 2023, June 12, 2024, May 21, 2025

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, solar panels and equipment 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 has met input into this plan.

MEASURE H BUDGET

STAFFING

Managers	1.31 permanent
Supervisors	2 permanent, 1 vacant
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	3 permanent
General Maintenance	2 permanent
Grounds Lead Worker	3 permanent
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 44.06 FTE

The projected cost of staffing, including benefits, for 2026/27 is $6,508,000. 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 2026/27 is $523,000.

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 usually performed by existing staff or when the required expertise is unavailable in-house. In the list below, we note 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 $120,000);
- Annual boiler inspections (estimated at $120,000);
- Life Safety System testing and repair, including fire alarm and sprinkler systems (estimated at $160,000);
- Asphalt repair and paving (estimated at $70,000);
- Tree removal and pruning (estimated at $40,000);
- Disposal of hazardous waste/lamps and ballasts etc (estimated at $80,000);
- Floor repairs/replacements (estimated at $30,000);
- General mechanical repairs (estimated at $60,000);
- Heating control repair and adjustment (estimated at $60,000);
- General plumbing (estimated at $50,000);
- 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 $1,824,000.

Vehicle and Equipment Purchase

We plan to replace two vehicles and buy a new trailer this year.

The projected cost for Vehicle/Equipment Purchase is $120,000

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 7.76%.

The projected cost for indirect support for 2026/27 is $412,000.

City and County Fees

The City of Berkeley and the County of Alameda charge fees to the fund for the collection and distribution of the taxes.

The projected cost for City and County fees for 2026/27 is $178,000

Projected Overall Totals for 2026-2027

Revenues	
Measure H Funding for 2025/26:	**$9,367,000.00**
Projected Interest from H for 2025/26:	**20,000.00**
Total Projected Income for Maintenance 2025/26:	**$9,387,000.00**
Expenditures	
Salaries/Benefits/Limited Term/Overtime:	**$6,508,000.00**
Supplies:	**523,000.00**
Contracted Services:	**1,824,000.00**
Vehicle and Equipment:	**120,000.00**
Indirect Costs Rates:	**412,000.00**
Projected Expenditures by Maintenance for 2025/26:	**$9,387,000.00**
Excess (Deficiency) of Revenue Over Expenditures	**(0)**
Beginning Fund Balance(25/26 carryover):	***$489,902.00***
Excess (Deficiency) of Revenue Over Expenditures	**(0)**
2026/27 Projected Ending Fund Balance:	**$489,902.00**

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 3% COLA**
3. **Indirect cost rate is 4.66% of expenses**
4. **Salaries are based on step and column of 3% increase in late 2026 plus a 4% increase in 2027**
5. **The 3% Reserve for Economic Uncertainties is approximately $281,612.00**

SUPPORT FROM OTHER FUNDS

The Bond, State School Building, Deferred Maintenance 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. The following is a sampling of projects that are ongoing or planned to be in construction for the next year:

1. Modernization of Longfellow Middle School
2. District-wide heat mitigation project
3. Modernization of Sylvia Mendez Elementary
4. Modernization of Thousand Oaks schoolyard