

FACILITIES MANAGEMENT

Summary of Principal Findings and Recommendations

The Facilities Management and Planning Division continues to take steps to address the recovery plan's recommendations. The division has made steady progress since the last review period. The division is implementing most of the FCMAT facilities standards, but has not yet reached the stage in which the recommended practices are fully implemented, monitored, and becoming systematic. In several areas, including preventative and planned program maintenance, standardization of procedures is delayed by the lack of a documented approach and plan.

The Oakland Unified School District is implementing several new and innovative districtwide initiatives, including a transition to small autonomous schools and a site-based budgeting approach known as results-based budgeting. Because these two projects are relatively new, it remains difficult to fully understand how they will affect the work of the Facilities Division in the future. Converting the district's large schools to smaller campus units is a multiyear effort that will affect the prioritization and workload of the Facilities Department's construction projects. Under results-based budgeting, custodians are managed by site administrators, and there is some discussion of moving toward a similar site charge-back system for maintenance work. The leadership and staff of the Facilities Division will have to continue to adjust its traditional approach under these new conditions.

Graffiti and vandalism continue to be significant, costly, and demoralizing problems for the district. The district has made little progress in addressing this issue in the year since these reviews began. While some steps have been taken, including making graffiti removal a priority for painting crews and custodians, the district continues to emphasize reactive measures rather than preventative strategies. A large percentage of the graffiti and vandalism incidents take place inside district buildings during school hours, and could therefore be prevented by improved supervision. The Department of Buildings and Grounds estimates that more than 50 percent of its routine work orders are directly related to vandalism and/or misuse of the district's facilities.

The Facilities Division is doing reasonably well at keeping up with most of the district's maintenance needs, but it is unreasonable to expect that the Facilities Division staff alone can make the district's buildings clean, safe, and productive learning environments. Combating the challenge of graffiti and vandalism must become a districtwide responsibility and requires leadership from those with the authority to elicit active participation from principals, custodians, teachers, students, parents, and community members. The district staff must work together to develop a comprehensive graffiti and vandalism abatement plan that outlines procedures, consequences, and specific responsibilities for all involved parties. Until a coordinated effort is made to implement proactive measures, the district will be limited as to how much it can improve its facilities, as long as graffiti and vandalism abatement divert resources from other educational priorities.

The district has made some efforts to update its Facilities Master Plan, but it needs to accelerate action in this area. In the absence of an up-to-date plan, the district lacks a blueprint for guiding facilities-related decisions. The district has contracted with a consultant who is close to completing a needs assessment of all the district's sites. The final scope of the plan is still in question, however, and different factions within the district and community have varying ideas about what the plan should contain. Regardless of the outcome of these discussions, it is vital that the plan encompass guidelines for prioritizing and approving projects. This plan component is essential to

ensuring that future projects are scheduled and undertaken in an appropriate and equitable manner. Determining and documenting these prioritization criteria should be of primary importance to the master planning team. Furthermore, the district must reestablish an active citizen's oversight committee to provide input on bond expenditures and the master planning process.

The Facilities Division has made the most notable improvements in the area of custodial services. At the time of the last review, the Custodial Services Department had just undergone a severe reduction in staffing levels, morale was extremely low, and unacceptable conditions were observed in many of the district's buildings. The department has responded proactively. Several new activities are planned for this fall. These include piloting a team cleaning approach, distributing and utilizing newly purchased equipment, starting a comprehensive training program, improving monitoring procedures and increasing consequences for poor attendance, emphasizing expectations for restroom inspections and cleanliness, and reinforcing custodial cleaning standards. It remains to be seen how successful these efforts will be at improving school cleanliness, but the plans are well developed and focused on improvement. The Custodial Services Department and Facilities Division are optimistic that the plans will allow custodians to be more effective and efficient at maintaining clean facilities, even as they undertake their work with fewer resources than in previous years.

In addition to the efforts relating to custodial services, the Facilities Division has targeted improvement of school grounds as a primary area of focus in the past several months. It purchased approximately \$300,000 of new equipment and supplies, reorganized the gardener shop, and restructured its approach to grounds maintenance. Grounds crews will now visit schools as a coordinated team to address a particular site's mowing and gardening needs on the same day. The review team observed improved grounds conditions at many schools across the district.

While the division has yet to implement a systematic process for conducting regular, comprehensive building inspections, the Department of Buildings and Grounds has addressed most of the issues raised by the Oakland Fire Department in its spring 2004 inspections. The division has acquired the services of an external consultant and is working site-by-site to ensure that every school has a functioning fire alarm system. Fire safety remains a significant issue at campuses where vandalism has disabled or caused the removal of fire alarm pulls and extinguishers.

The Facilities Division and district staff should continue working collaboratively to address the recovery plan's recommendations.

1.7 School Safety – Installation and Operation of Outside Security Lighting

Professional Standard

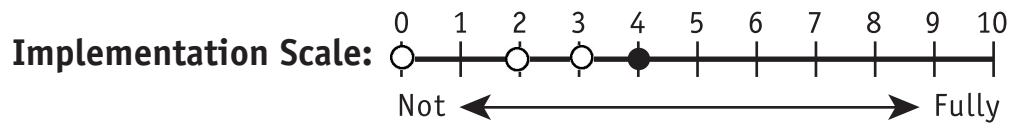
Outside lighting is properly placed and monitored on a regular basis to ensure the operability/adequacy of such lighting to ensure safety while activities are in progress in the evening hours. Outside lighting should provide sufficient illumination to allow for the safe passage of students and the public during after-hours activities. Lighting should also provide security personnel with sufficient illumination to observe any illegal activities on campus.

Progress on Implementing the Recommendations of the Recovery Plan

1. The district is still experiencing delays and inefficiencies related to the routine replacement of light bulbs. Custodians should replace light bulbs that are accessible with a six-to-eight foot ladder, however many site-level staff members (including teachers, administrators, and custodians) don't know who is responsible for this task. As a result, the Department of Buildings and Grounds continues to receive work orders for routine light bulb replacements. The department should be called to address wiring problems only with light fixtures, or when bulbs are located above six to eight feet. The Director of Custodial Services indicated that this information will be clearly communicated to site administrators and custodians through meetings, memos, and training sessions in fall 2004. It is also recommended that the district implement a process requiring school office managers to print copies of outstanding work orders for the site each week and share these with the Custodian. This will allow the Custodian to address any requests that were improperly directed to the Department of Buildings and Grounds, including routine light bulb replacement.
2. The district's design standards include specifications that exterior light fixtures "shall all be heavy-duty vandal resistant" for all schools undergoing new construction and renovation. However, light fixtures at some campuses remain easy targets for vandalism. The Director of Buildings and Grounds indicated that some of these fixtures are already scheduled for replacement in the near future. The district should continue working to ensure that all sites maintain light fixtures of the type and in locations that discourage vandalism. For example, mounted exterior lights that reflect light downward and are more difficult to shoot out. Fixtures with protective cages are also difficult to damage. This is most important for sites that experience regular problems with vandalism.
3. Several schools continue to lack adequate exterior lighting to ensure safety and security. In some cases, this is due to insufficient lighting, and currently, no resources are budgeted to expressly address the expansion of outside lighting. As noted previously, at several campuses exterior lighting has been disabled by vandalism. As recommended in previous reports, the district should take comprehensive action to prevent vandalism (see Standard 1.8).

Standard Implemented: Partially

January 2000 Rating: 0
September 2003 Rating: 2
March 2004 Rating: 3
September 2004 Self-Rating: 4
September 2004 New Rating: 4



1.8 School Safety – Graffiti and Vandalism Abatement Plan

Professional Standard

The district has a graffiti and vandalism abatement plan. The district should have a written graffiti and abatement plan that is followed by all district employees. The district provides district employees with sufficient resources to meet the requirements of the abatement plan.

Progress on Implementing the Recommendations of the Recovery Plan

1. The district has made little progress in this area in the past year. Graffiti and vandalism continue to be significant, costly, and demoralizing problems. The Facilities Division drafted a board policy suggesting that the State Administrator adopt a graffiti and vandalism abatement plan, but at the time of this report, the policy had not been adopted and no plan had been developed. The State Administrator has instructed the custodial and maintenance staff to make graffiti removal a high priority; however this continues to emphasize a reactive approach. As recommended previously, attention must be given at the district's highest levels to developing and implementing proactive measures to prevent the rampant incidents of graffiti and vandalism. Combating this problem must become a districtwide responsibility, and will necessitate active participation from executive directors, principals, custodians, teachers, students, parents, and community members.

The district staff must work together to develop a plan that outlines procedures, consequences, and specific responsibilities for all involved parties. It should then hold informational or training sessions to ensure that all staff members responsible for supporting the plan clearly understand their roles and responsibilities. For school sites that have consistent problems with graffiti and vandalism, this will include improving supervision in problem areas. Until a coordinated effort is made to implement proactive measures, the district will be limited in how much it can improve its facilities, and will continue to spend precious resources on preventable painting and repair work.

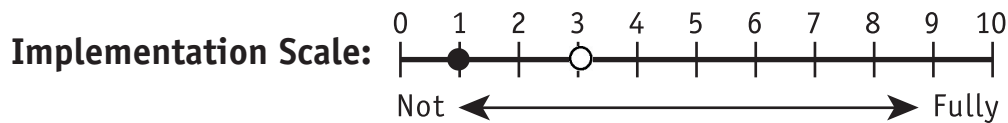
2. As was the case in previous reviews, the Facilities Division staff continue to perform reasonably well at responding to most of the district's maintenance needs, yet the staff is limited as to how much it can affect prevention. Some new measures the division is implementing to address the problem of graffiti include the following:
 - a. Increasing regularly scheduled visits by painting crews to those schools sites that experience a high incidence of graffiti. The buildings and grounds crews will visit each high school campus once a week to paint over graffiti.
 - b. Bringing back custodians who have been off on occupational leave so they can perform "light duty" by supervising bathrooms and hallways.
 - c. Tiling bathroom walls at high schools to facilitate cleaning of graffiti by custodians and lessen the need for repainting by the buildings and grounds crew.

The district also may want to consider creating a vandalism fund to ensure that the Facilities Division has adequate resources to address site needs. This may be undertaken in collaboration with the Risk Management Department. Additionally, the district should take steps to structure collective bargaining agreements to allow custodians to handle incidental painting (see Standards 8.6a and 8.6b).

3. In addition to the aforementioned actions, the division is considering implementing a “charge-back” system so that schools with excessive interior graffiti pay for repainting with their own site-level budgets. This is intended to encourage schools to increase supervision of students during school hours. As recommended previously, the district and division also should implement an incentive program to reward schools that are able to decrease incidents of graffiti and vandalism. This could include redirecting graffiti painting crews so they instead paint classrooms and hallways, and encouraging campuswide beautification and pride-building activities. The district may consider implementing a pilot at one or two schools to test various approaches and develop models for success.
4. As was the case in previous reviews, local law enforcement has not yet been consulted to develop a graffiti and vandalism abatement plan. The plan should ensure that after-hours monitoring of school sites includes yard areas that are not visible when police drive by campuses.

Standard Implemented: Partially

January 2000 Rating:	3
September 2003 Rating:	1
March 2004 Rating:	1
September 2004 Self-Rating:	3
September 2004 New Rating:	1



1.12 School Safety – Inspection and Correction of Unsafe Buildings

Legal Standard

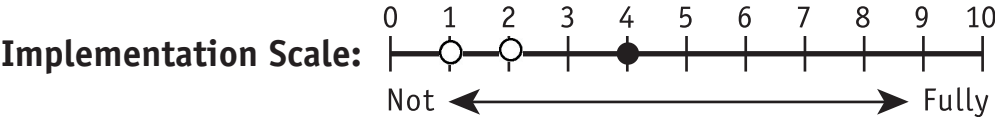
Building examinations are performed, and required actions are taken by the Governing Board upon report of unsafe conditions [EC 17367].

Progress on Implementing the Recommendations of the Recovery Plan

1. The district has not yet implemented a comprehensive or systematic building inspection process. The Custodial Services Department has been focusing primarily on bathroom cleanliness; however the department director indicates that as bathroom cleaning procedures become more routine, custodial field supervisors will conduct more thorough building inspections when they visit school sites. As noted in Standard 1.24, the district has made some progress in training site administrators on the Injury Illness Prevention Plan (IIPP). This plan incorporates the direction that facility inspections should be completed by site administration, so it is important that all administrators receive appropriate training. The Environmental Health and Safety Manager should follow up to be sure that inspections are being conducted as outlined in the IIPP. As recommended previously, the district must ensure that all custodial, maintenance, and site staff clearly understand their responsibilities with regard to building inspections. The district’s decentralized approach to building inspections is not as thorough as having inspections performed by a trained tradesperson, but if successfully implemented, it will be a substantial improvement from the current practice.
2. As noted in the last six-month review, the Director of Buildings and Grounds has documented a prioritization policy for handling work orders and prepared a handbook to be shared with site administrators so they understand how their requests are handled. These procedures will be reviewed at meetings with principals prior to the start of the 2004-05 school year (see Standard 8.12).

Standard Implemented: Partially

January 2000 Rating:	2
September 2003 Rating:	1
March 2004 Rating:	4
September 2004 Self-Rating:	5
September 2004 New Rating:	4



1.14 School Safety – Sanitation is Maintained and Fire Hazards are Corrected

Legal Standard

Sanitary, neat, and clean conditions of the school premises exist and the premises are free from conditions that would create a fire hazard [CCR Title 5 Section 633].

Progress on Implementing the Recommendations of the Recovery Plan

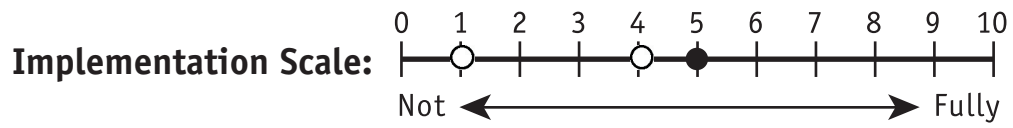
1. Since the time of the last review, the district has taken several significant actions related to the safety of its facilities. These include the following:
 - a. The Department of Buildings and Grounds has addressed most of the issues raised by the Oakland Fire Department in its spring 2004 inspections.
 - b. The Custodial Services Department is pursuing new approaches to improve school cleanliness including piloting a team cleaning approach, implementing a comprehensive training program, and enforcing the custodial cleaning standards (see Standards 8.6a and 8.9/8.10).
 - c. The Facilities Department has acquired the services of an external consultant and is working site-by-site to ensure that every school has a functioning fire alarm system. At the time of this review, the alarm systems at roughly 20 of the district's approximately 100 sites had been evaluated, repaired as necessary, and deemed to be functioning. The team is also documenting formal district procedures for fire alarm system design, installation, and testing.

The district is still working to implement regular building inspections by custodians and site administrators (see Standard 1.12). As was the case in previous reviews, the review team observed that at several middle and high school sites, fire extinguishers and hoses had been removed and alarms had been disabled due to repeated incidents of vandalism. The need to implement new procedures to reduce vandalism still remains (see Standards 1.8 and 1.16).

2. The district has made good progress on training site administrators and buildings and grounds staff on the topics outlined in the IIPP, and has documented plans to train custodians in fall 2004. It is important to continue these efforts and ensure that all appropriate personnel are trained (see Standard 1.24).

Standard Implemented: Partially

January 2000 Rating: 1
September 2003 Rating: 1
March 2004 Rating: 4
September 2004 Self-Rating: 5
September 2004 New Rating: 5



1.16 School Safety – Fire Extinguishers and Inspection Information Available

Legal Standard

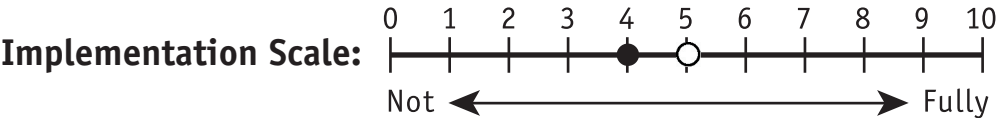
Appropriate fire extinguishers exist in each building and current inspection information is available [CCR Title 8 Section 1922(a)].

Progress on Implementing the Recommendations of the Recovery Plan

1. The district continues to contract with a private firm to inspect and refill fire extinguishers annually. Current extinguisher inspection information is available.
2. The Custodial Services Department has not yet implemented a system providing for custodial site supervisors to check fire extinguishers monthly, but the director indicates that he still maintains plans to do so. Custodians will check and initial the extinguisher tags to confirm that they are full and up to date. Information about missing or expired extinguishers will be communicated to the contracted firm through the Custodial Services Department. This expectation will be communicated to custodians at training sessions in fall 2004.
3. Vandalism of fire extinguishers remains pervasive at several middle and high school sites. At these schools, extinguishers are regularly stolen or discharged, or are removed and hidden by the site staff to prevent these types of incidents. Once again, the review team observed sites where the majority of hoses and extinguishers had been removed. This remains a serious safety issue and is beyond the Facilities Division’s control. Improving site supervision and preventing vandalism of fire safety equipment should be a high priority for site level and district staff (see Standard 1.8).

Standard Implemented: Partially

January 2000 Rating:	5
September 2003 Rating:	4
March 2004 Rating:	4
September 2004 Self-Rating:	4
September 2004 New Rating:	4



1.24 School Safety – Conduct of Periodic Safety Training for Employees

Professional Standard

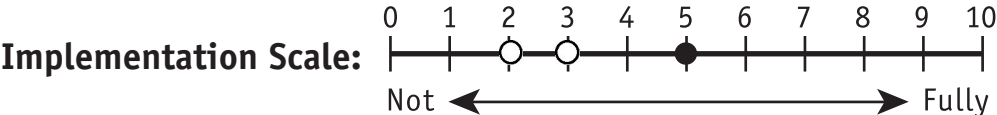
The district conducts periodic safety training for employees. District employees should receive periodic training on the safety procedures of the district.

Progress on Implementing the Recommendations of the Recovery Plan

1. As noted in the previous six-month review, the Environmental Health and Safety Manager position now falls under the Risk Management Department. The individual filling this position is still responsible for implementing a comprehensive safety program throughout the district.
2. Since the last six-month review, approximately three-fifths of the district's principals have received the safety training required by the Injury Illness Prevention Plan (IIPP). The Environmental Health and Safety Manager is working with the two remaining executive directors to schedule training sessions for the principals under their supervision. It is not clear how many of the principals have trained their staff and/or implemented the required safety procedures at the site level. As recommended previously, the district should instruct executive directors and principals to make this safety training and implementation of the IIPP a priority.
3. The Director of Custodial Services has coordinated with the Environmental Health and Safety Manager to schedule a four-hour health and safety training module for the custodial staff. This session will cover a number of topics, including the IIPP, asbestos, blood-borne pathogens, personal protective equipment, emergencies and general safety. The training is scheduled for fall 2004. As noted previously, the Environmental Health and Safety Manager has conducted extensive safety training with buildings and grounds managers and staff.

Standard Implemented: Partially

January 2000 Rating:	2
September 2003 Rating:	3
March 2004 Rating:	3
September 2004 Self-Rating:	5
September 2004 New Rating:	5



2.1 Facility Planning – Maintenance of a Long-Range Facilities Master Plan

Professional Standard

The district should have a long-range school facilities master plan.

Progress on Implementing the Recommendations of the Recovery Plan

1. The district has contracted with an outside consultant to update the Facilities Master Plan, and an initial assessment of site conditions is almost finished. Site visits have been completed, and the Facilities Department is working to collect surveys from site administrators. The division is renegotiating the scope of the contract with the consultant to ensure that the plan contains all needed elements.

Because the district has limited funds and is in the preliminary phase of implementing several new initiatives (including small schools and results-based budgeting, or RBB), there is a question as to whether it is appropriate for the master plan to be as comprehensive as the previous version (2000). Some within the district feel that the master plan should be little more than a documented needs assessment for each site. This is based on the perspective that it may not make sense to spend precious resources defining extensive plans when the district's approach to school make-up is still changing. In contrast, others feel that the plan should be expansive enough to incorporate and align with many other district efforts, including the Technology Plan and proposals for future utilization of facilities.

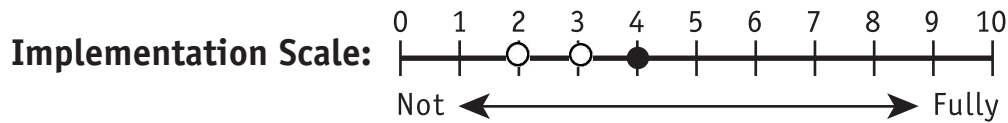
The district's leadership team must consider the different options and decide upon an explicit scope for the Facilities Master Plan. At a minimum, the updated Facilities Master Plan should include:

- Priorities, time lines, costs, and suggested funding sources for all projects.
- Guidelines or “rules” for how projects are to be prioritized and approved. This should include a ranking system that assigns scores to both individual projects and entire school sites. There has been some discussion with the contractor regarding a prioritization system in the expanded scope for the Master Plan, but the details of these guidelines have not yet been determined. This plan component is essential to ensuring that future projects are scheduled and undertaken in an appropriate and equitable manner. Determining and documenting these prioritization criteria should be of primary importance to the master planning team.
- An accounting projects that may be completed in multiple steps over several years as additional funding becomes available. Facility improvement projects for each individual school should be sequenced and planned so that each project builds on the other toward a final goal. This will prevent Project B from requiring that Project A be demolished due to lack of foresight and staged planning.

- A meaningful public involvement component. The district has formed several cross-organization, cross-department subcommittees related to the master planning effort, but has not yet established a proper Citizen’s Oversight Committee (see Standard 2.4). This committee should consist of members of the community and be involved in the master planning effort.
2. The district has created a model for educational specifications at the elementary school level, but has essentially abandoned the effort to develop prototypical educational specifications for middle and high schools. The Facilities Department has decided that generic specifications would have limited utility and relevance in light of the district’s move toward small, unique, and specialized secondary schools.

Standard Implemented: Partially

January 2000 Rating:	4
September 2003 Rating:	2
March 2004 Rating:	3
September 2004 Self-Rating:	4
September 2004 New Rating:	4



2.4 Facility Planning – Existence of a District Facility Planning Committee

Professional Standard

The district has created a Citizens Oversight Committee to ensure the appropriateness of expenditures related to the recent passage of the district's local school bond measure. In essence, this committee will function as an advisory/facility planning type of committee.

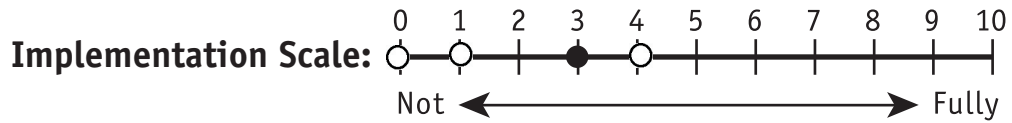
Progress on Implementing the Recommendations of the Recovery Plan

1. At the time of the last six-month review, a facilities advisory committee had been established consisting of school board members (or, in a few cases, their designees). This group was involved in discussions regarding site utilization and school closures but has not met to discuss facility-related issues in several months. To discuss the Facilities Master Plan, the district has also formed several subcommittees made up of district employees and members of community-based organizations. The Citizens Oversight Committee, made up of community members and assigned to provide input on bond expenditures, does not currently exist. This committee should be re-established immediately, and invited to participate in the master planning process. It is not appropriate for board members to serve on this committee, as the committee's future role will be to provide input on bond expenditures that will help to inform the board. The district should solicit a broad representation of community members to serve, including representatives from various regions within the district, as well as a cross-section of ethnic and economic backgrounds.
2. The district has not yet formalized bylaws and procedures for the Citizens Oversight Committee. This should be undertaken immediately, so that committee members, the community, and the school board understand the scope of the committee's responsibilities. The Facilities Department should create a handbook for the Citizens Oversight Committee including the following:
 - Who should serve and how they should be appointed.
 - The scope of responsibility and decision-making authority of the committee (as defined by bond language and board policy).
 - Procedures for conducting meetings and providing input on facility-related planning.
 - Documented criteria for prioritization of facility projects, to be established in the Facilities Master Plan (under development; see Standard 2.1).
3. In the past, the Citizens Oversight Committee members were chosen by the school board. In the future, members could be appointed by a variety of sources, including the board, Assistant Superintendent of Facilities Management and Planning, Director of Facilities, and State Administrator/Superintendent. This would help to ensure a diverse representation from the community.

- The Assistant Superintendent of Facilities Management and Planning is currently coordinating committee activities. This responsibility could eventually be passed on to the Director of Facilities.

Standard Implemented: Partially

January 2000 Rating: 1
September 2003 Rating: 0
March 2004 Rating: 4
September 2004 Self-Rating: 4
September 2004 New Rating: 3



2.6 Facility Planning – Implementation of an Annual Capital Planning Budget

Professional Standard

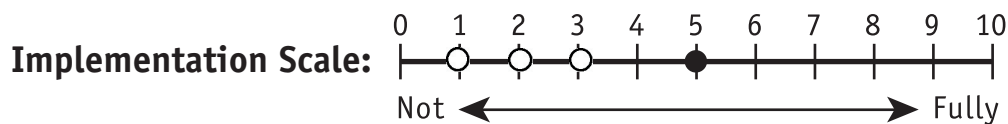
The district should develop and implement an annual capital planning budget.

Progress on Implementing the Recommendations of the Recovery Plan

1. The Facilities Department has now implemented an annual capital budget to manage available cash on hand and future revenues, allowing the department to track expenditures and ensure that they do not exceed available funds. The Facilities Management and Planning Division still has not developed and documented a policy for prioritizing deferred maintenance and modernization needs on a districtwide basis. It is expected that this will be included in the updated Facilities Master Plan (see Standard 2.1).
2. The written capital construction and renovation projects budget has not yet been coordinated with a written deferred maintenance projects budget. While some deferred maintenance projects have been managed by capital planning, the district has not yet developed a systematic approach to integrating the two planning and funding processes. To the extent that large deferred maintenance projects are like capital planning projects, there is limited coordination between the two. Implementation of deferred maintenance projects should be consistent with the Facilities Master Plan (see Standard 2.1).

Standard Implemented: Partially

January 2000 Rating:	1
September 2003 Rating:	2
March 2004 Rating:	3
September 2004 Self-Rating:	6
September 2004 New Rating:	5



2.17 Facility Planning – Priorities and Scheduling of Projects

This standard has been added since the 2000 report.

Professional Standard

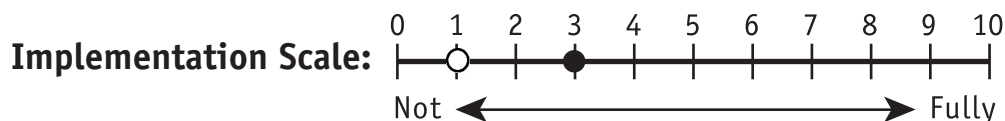
The district has established and utilizes an organized methodology of prioritizing and scheduling projects.

Progress on Implementing the Recommendations of the Recovery Plan

1. The district has not yet identified and documented a methodology for prioritizing and scheduling projects. This should be an essential component of the updated Facilities Master Plan. As recommended previously, this procedure should be written in a manner that limits special interests from influencing funding decisions and requires strict adherence by the school board (see Standard 2.1).
2. The district has continued to focus on modernization projects that provide state matching dollars and leverage of bond funds, however the state funds will soon be exhausted. The Facilities Department is also beginning to address facility needs resulting from the district's site reutilization plans and small schools movement. It is anticipated that these initiatives will result in additional facility needs in the future, and the district has not yet developed a plan for how these projects will be funded or incorporated into the current queue of projects.
3. The Facilities Department continues to work on a list of projects prioritized by the State Administrator. The department staff reports that in the absence of the board, the simplified and expedited approval process has allowed projects to proceed in a more organized manner. However, the staff also expressed concerns that the potential still exists for special interests or political pressures to influence the project approval process and time line. Passing a board policy that documents the procedure and criteria for project approval may help to avert this scenario.

Standard Implemented: Partially

January 2000 Rating:	Not Assessed
September 2003 Rating:	1
March 2004 Rating:	3
September 2004 Self-Rating:	3
September 2004 New Rating:	3



2.18 Facility Planning – Equity of Distribution of Facility Funding

This standard has been added since the 2000 report.

Professional Standard

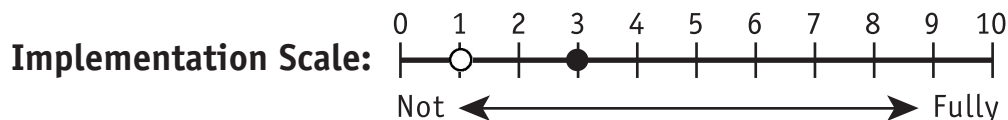
The district should distribute facility funding in an equitable manner to all communities served and to all school levels.

Progress on Implementing the Recommendations of the Recovery Plan

1. To ensure equity, the district is still in need of a documented policy on how facility funding distribution decisions will be made. It is essential that this be included in the updated Facilities Master Plan (see Standard 2.1).
2. The district has created a model for educational specifications at the elementary school level, but has essentially abandoned the effort to develop prototypical educational specifications for middle and high schools. The Facilities Department has decided that generic specifications would be of limited use and relevance in light of the district's move toward small, unique, specialized secondary schools. While this may be the case, it is still important that the division develop some kind of standards to compare and balance facility decisions.
3. The Director of Facilities indicated that the Facilities Master Plan will contain districtwide loading standards, which will help serve as a guideline for distributing resources across campuses. As the district administration begins to implement the small schools initiative, it proposes making several modifications to existing facilities. Given the limited resources currently available to the district, it is important that facilities utilization proposals consider and document funding sources and allocation. A comprehensive and documented multiyear plan will help to ensure that all projects receive comparable consideration and resources.

Standard Implemented: Partially

January 2000 Rating:	Not Assessed
September 2003 Rating:	1
March 2004 Rating:	3
September 2004 Self-Rating:	3
September 2004 New Rating:	3



3.10 Facilities Improvement and Modernization – Plan for Maintenance and Modernization Exists

Legal Standard

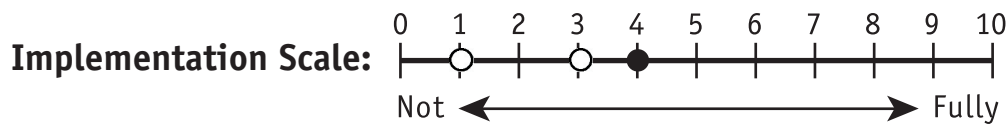
The district maintains a plan for the maintenance and modernization of its facilities [EC 17366].

Progress on Implementing the Recommendations of the Recovery Plan

1. In the absence of an updated Facilities Master Plan, the district continues to follow its current Deferred Maintenance Plan and the list of board-approved projects selected by the State Administrator. As recommended, the Facilities Master Plan should identify, prioritize, and coordinate all modernization projects, deferred maintenance projects, and all other projects (see Standard 2.1).
2. The district maintains and utilizes detailed design standards that help to ensure uniformity of approach to its various projects.

Standard Implemented: Partially

January 2000 Rating:	1
September 2003 Rating:	1
March 2004 Rating:	3
September 2004 Self-Rating:	4
September 2004 New Rating:	4



3.12 Facilities Improvement and Modernization – Deferred Maintenance Projects are Actively Managed

Professional Standard

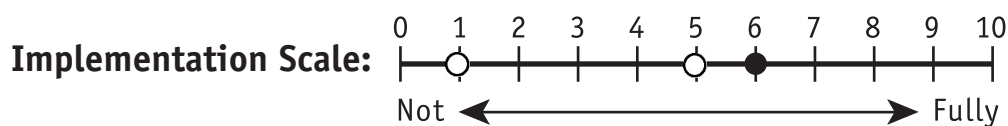
The district actively manages the deferred maintenance projects. The district should review the five-year Deferred Maintenance Plan annually to remove any completed projects and include any newly eligible projects. The district should also verify that the expenses performed during the year were included in the state approved five-year Deferred Maintenance Plan.

Progress on Implementing the Recommendations of the Recovery Plan

1. The Facilities Department is currently responsible for managing the district’s deferred maintenance projects. The Director of Buildings and Grounds is seeking to hire a project manager for this purpose, at which point the responsibility for deferred maintenance will transfer back to his department. While deferred maintenance projects are being actively managed within the district, a thorough coordination between the departments of Facilities and Buildings and Grounds is still somewhat lacking. A well-developed deferred maintenance program has a written plan that is fully integrated with other capital construction projects. Usually, it includes a spreadsheet that shows the type of project, the cost, the funding source, and the duration of the project over one or more fiscal years. The division is still lacking this type of detail in its plan.
2. The current state-approved Deferred Maintenance Plan is valid through fiscal year 2007-08. The plan is reviewed annually.
3. The Director of Buildings and Grounds maintains responsibility for annually updating the Deferred Maintenance Plan.
4. As neither the Citizens Oversight Committee nor the school board facilities committee is currently active, the Deferred Maintenance Plan is not currently shared with any advisory group. Once these committees are re-established, it may be appropriate to share the plan with these groups annually.

Standard Implemented: Partially

January 2000 Rating:	1
September 2003 Rating:	1
March 2004 Rating:	5
September 2004 Self-Rating:	6
September 2004 New Rating:	6



6.3 Special Education Facilities – Adequacy for Instructional Program Needs

Professional Standard

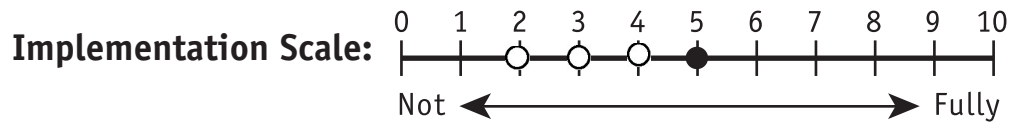
The district provides facilities for its special education programs that provide appropriate learning environments in relation to educational program needs.

Progress on Implementing the Recommendations of the Recovery Plan

1. The district's master planning team is in the process of conducting a survey of all site administrators to assess the current state of district facilities. Included in this survey are questions about accessibility and the status of facilities for students with special needs. These should be included in the updated Facilities Master Plan. The district continues to make a concerted effort to assess, update, and improve conditions for its exceptional children.
2. Feedback from district staff indicates that the Facilities Department has been diligent about including representatives from the programs for exceptional children in facility-related discussions and decisions. The Executive Director of Special Education was actively involved in Site Utilization Committee meetings. Representatives from this department have not yet participated in discussions regarding the Facilities Master Plan, but the Executive Director reported there are plans for this coordination to occur.
3. Since the last review period, the district has redirected use of two school sites for special education purposes. These include transforming the Foster Elementary School into a central administrative center for the Special Education Department. Previously the special education offices were spread across eight sites throughout the district. Housing them in one central location allows for greater program coordination and efficiency. Furthermore, the Foster site also encompasses space to offer professional development for both special and general education teachers. The Executive Director of Special Education reports that this has created an opportunity for improving the inclusion of special education students in mainstream settings. In addition to the Foster offices, the district is also expanding the Tilden Elementary School to encompass the former John Swett Elementary site and serve as an integrated and inclusive site for children in grades Pre-K through Grade 2.
4. The district's educational specifications show that new construction and modernization projects integrate spaces for meeting the needs of special education students. As recommended previously, the district should consider conducting a review of post-occupancy data to ensure that the number and size of those spaces is appropriate.

Standard Implemented: Partially

January 2000 Rating: 2
September 2003 Rating: 3
March 2004 Rating: 4
September 2004 Self-Rating: 4
September 2004 New Rating: 5



8.3 Facilities Maintenance and Custodial – Tracking Energy Consumption

This standard has been added since the 2000 report.

Professional Standard

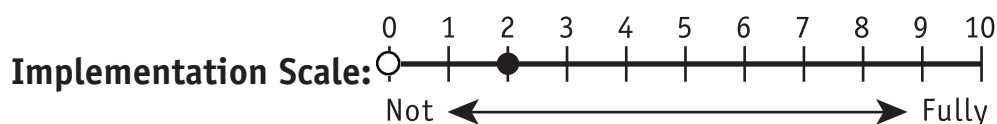
The district should create and maintain a system to track utility costs and consumption, and to report on the success of the district's energy program.

Progress on Implementing the Recommendations of the Recovery Plan

1. The district has not yet selected or implemented energy management software to accurately track and monitor utility usage at the site level. It should do so without delay, and ensure that adequate support is allocated for successful implementation. This includes consideration of appropriate staffing and funding levels.
2. Some classes at one district middle school piloted an energy education curriculum in 2003-04. This effort was not schoolwide, and it is unclear how comprehensive or successful it was, particularly in absence of the ability to track utility usage at the site level before and after the curriculum was implemented. The district should investigate the possibility of forming partnerships with community groups that can help educate its students and staff about energy conservation. Once monitoring procedures and an education component have been implemented, the district can offer incentives to schools that show energy savings.
3. The district has not yet implemented procedures for regular review of energy usage trends or corresponding policies for follow-up actions. These should include incentives for sites that show effective or improving practices, and enhanced education for sites that show need for improvement. The district should also conduct a cost-benefit analysis (based on square footage calculations) to see whether implementing a resource conservation program would be worthwhile. This type of program would include some capital outlay items for switches, valves, and control hardware, as well as establishing a Resource Conservation Manager position.

Standard Implemented: Partially

January 2000 Rating:	Not Assessed
September 2003 Rating:	0
March 2004 Rating:	2
September 2004 Self-Rating:	2
September 2004 New Rating:	2



8.5 Facilities Maintenance and Custodial – Adequate Maintenance Records and Inventories

Professional Standard

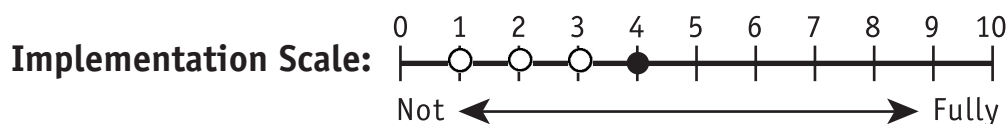
Adequate maintenance records and reports are kept, including a complete inventory of supplies, materials, tools, and equipment. All employees required to perform maintenance on school sites should be provided with adequate supplies, equipment, and training to perform maintenance tasks in a timely and professional manner. Included in the training is how to inventory supplies and equipment and when to order or replenish them.

Progress on Implementing the Recommendations of the Recovery Plan

1. The Custodial Services Department is preparing to implement a comprehensive training curriculum in fall 2004. This will include a basic site management module, which will train custodians on ordering, using, and managing equipment and supplies.
2. There is no longer a need for a central inventory of supplies, as custodial supplies are now purchased at the site level and maintenance parts and materials are purchased on a “just-in-time” basis.
3. Maintenance records remain somewhat inaccurate because buildings and grounds staff are not sufficiently diligent about closing out tags for completed work. In order to maintain a precise accounting of job response time, as well as the number and details of outstanding work orders, it is essential that maintenance staff close tags as soon as work has been completed. The Department of Buildings and Grounds has completed an inventory of district equipment by site, which should be updated annually.
4. The Custodial Services Department still does not maintain an accurate inventory of what equipment the district owns or where it is located. The department is monitoring the location of the roughly \$255,000 of new equipment that it recently purchased, however it does not have an up-to-date documentation of previously existing equipment or its location. The Director of Custodial Services indicated plans to complete this inventory in fall 2004.

Standard Implemented: Partially

January 2000 Rating:	2
September 2003 Rating:	1
March 2004 Rating:	3
September 2004 Self-Rating:	4
September 2004 New Rating:	4



8.6a Facilities Maintenance and Custodial – Procedures for Evaluation of Custodial Staff

Professional Standard

Procedures are in place for evaluating the work quality of custodial staff. The quality of the work performed by the custodial staff should be evaluated on a regular basis using a board-adopted procedure that delineates the areas of evaluation and the types of work to be evaluated.

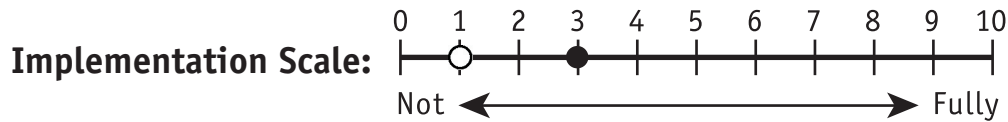
Progress on Implementing the Recommendations of the Recovery Plan

1. The Custodial Services Department has not yet revised its evaluation form to align to the district's custodial cleaning standards. The department is still working to implement systematic evaluations. They were not conducted regularly in 2003-04. The Director reports that all custodians will be evaluated during the 2004-05 year. These evaluations will be conducted by the site principals and custodial site supervisors in consultation with the custodial field supervisors. Once new evaluation forms and criteria have been approved by AFSCME, they should be reviewed with the staff before the evaluation period so that expectations are understood. One area where the district has demonstrated progress in the past six months is in monitoring employee attendance. The Facilities Division has implemented its own attendance tracking system and is keeping accurate records of custodial absences. Supervisors now have the opportunity to monitor and address excessive absences.
2. The district's custodial cleaning standards, policies, and procedures are not yet consistently followed, but will be primary areas of focus in the training modules scheduled to be implemented in fall 2004. Following these trainings, field supervisors' observation rounds should include a check to be sure that appropriate standards and procedures are being followed. In cases where they are not, disciplinary actions should ensue.
3. The district is preparing to negotiate the custodial contract with AFSCME; the current contract will expire in June 2005. Issues that should be addressed include:
 - a. **Promotions.** Under the current system, promotions are based on seniority. Attendance and performance should also be factors in promotion decisions.
 - b. **Standards-Based Evaluations.** Custodial evaluations should be aligned with the district's custodial cleaning standards.
 - c. **Scope of Work.** Custodians should be allowed and expected to address basic maintenance needs around the campuses, including incidental (spot) painting.
4. The Custodial Services Department will implement a comprehensive training program in fall 2004. Consisting of eight modules and 25 hours, the training will cover health and safety, basic site management, advanced site management, seasonal cleaning, supervision, customer service and site relations, beginning cleaning procedures, and advanced cleaning procedures and equipment.

- The district has not yet formed a Custodial Advisory Committee. While this is not a crucial step in implementing the recovery plan, it would help ensure that districtwide custodial issues are addressed in a fair, efficient, and effective manner. This is especially relevant in light of the district's move towards RBB, where principals who may not have experience in this area will have increased responsibility for overseeing site conditions and custodians. The advisory group should be comprised of principals, field supervisors, head custodians, and union representatives. Its primary mission would be to provide advice on matters related to the provision of custodial services.

Standard Implemented: Partially

January 2000 Rating: 1
September 2003 Rating: 1
March 2004 Rating: 1
September 2004 Self-Rating: 3
September 2004 New Rating: 3



8.6b Facilities Maintenance and Custodial – Procedures for Evaluation of Maintenance Staff

Professional Standard

Procedures are in place for evaluating the work quality of maintenance staff. The quality of the work performed by the maintenance staff should be evaluated on a regular basis using a board-adopted procedure that delineates the areas of evaluation and the types of work to be evaluated.

Progress on Implementing the Recommendations of the Recovery Plan

This standard is not one of the identified subset of standards to be assessed for return of local governance. A review of this standard was conducted at the request of the district.

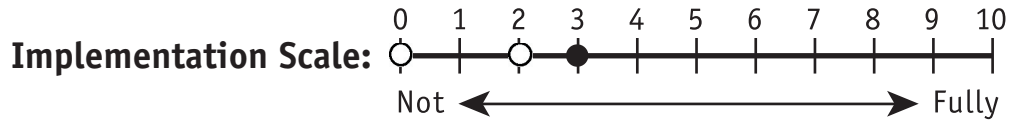
1. The Director of Buildings and Grounds and his managers have drafted rubrics of maintenance standards and expectations for several shops. Ranked on a four-point scale from "unsatisfactory" to "thoroughly satisfactory," performance can be scored on both general categories (such as quantity of work and attendance) as well as trade-specific skills (such as welding, knowledge of cooling systems, and weed abatement). These rubrics have not yet been shared with all buildings and grounds staff members or used in evaluations.

The department continues to conduct annual evaluations using the existing district form, but has drafted an alternate one. The department should finalize and adopt trade-specific performance standards and ensure that they are well communicated to the maintenance staff throughout the district. As recommended previously, these standards should be used to create specialized evaluation forms that are appropriate for the trades and professions within the Department of Buildings and Grounds.

2. Managers from the Department of Buildings and Grounds have been instructed on how they are to evaluate the staff members under their supervision. Revised evaluation forms and performance standards should be reviewed with managers and the staff before the evaluation period so that expectations are understood.
3. The Director of Buildings and Grounds indicates that in 2003-04, the majority of staff members in the department were evaluated using the district's evaluation form. As noted in Standard 8.6a, the Facilities Division has also implemented a thorough attendance tracking system, so the Department of Buildings and Grounds has been monitoring attendance by trade shop. In 2003-04 the gardeners had the highest rate of absenteeism, which the Assistant Superintendent of Facilities attempted to address by reorganizing the shop's staff, modifying his approach and clearly communicating expectations.

Standard Implemented: Partially

January 2000 Rating: 2
September 2003 Rating: 0
March 2004 Rating: 3
September 2004 Self-Rating: 4
September 2004 New Rating: 3



8.8 Facilities Maintenance and Custodial – Implementation of a Preventative Maintenance Plan

Professional Standard

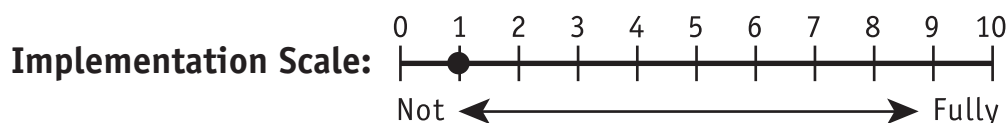
The district has an effective preventive maintenance program. The district should have a written preventive maintenance program that is scheduled and followed by the maintenance staff. This program should include verification of the completion of work by the supervisor of the maintenance staff.

Progress on Implementing the Recommendations of the Recovery Plan

1. This district has not yet developed or documented a formal, written Preventative Maintenance Plan. It does have an inventory of the number and types of equipment that would fall under the plan. The district does undertake preventative maintenance activities; however the extent of the current documented plan is a listing of summer projects by trade shop. As recommended previously, the comprehensive plan should include the tasks to be completed, the responsible staff position, and the schedule for completion. The plan should also include procedures for tracking repairs to specific pieces of equipment.
2. The district maintains a Computerized Maintenance Management System (CMMS) with relatively minimal capabilities. Because the current system does not prompt the user to undertake preventative maintenance activities, they can be overlooked. The CMMS should automatically generate preventative maintenance work orders based on a preventative maintenance schedule. These should become priority work orders if the district is to move toward a more proactive maintenance system. (See Standards 8.11 and 8.12 for more on the CMMS).

Standard Implemented: Partially

January 2000 Rating:	1
September 2003 Rating:	1
March 2004 Rating:	1
September 2004 Self-Rating:	1
September 2004 New Rating:	1



8.9/8.10 Facilities Maintenance and Custodial – All Buildings, Grounds and Bathrooms are Maintained

This standard has been reworded/combined since 2000.

Professional Standard

Toilet facilities are adequate and maintained. All buildings and grounds are maintained [CCR Title 5 Section 631].

Progress on Implementing the Recommendations of the Recovery Plan

This standard is not one of the identified subset of standards to be assessed for return of local governance. A review of this standard was conducted at the request of the district.

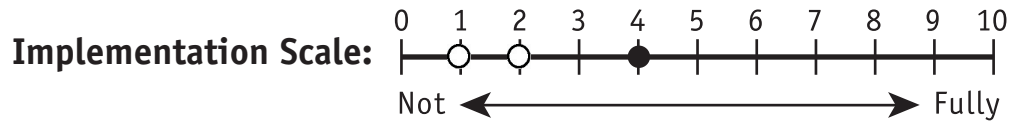
1. The Department of Buildings and Grounds is in the process of developing maintenance standards outlining how buildings and grounds are to be maintained. The Facilities Division has also targeted improvement of school grounds as a primary area of focus in the past several months. It purchased approximately \$300,000 of new equipment and supplies, reorganized the gardener shop, and restructured its approach to grounds maintenance. Grounds crews will now visit schools as a coordinated team to address a particular site's mowing and gardening needs on the same day. The FCMAT review team observed improved grounds' conditions at schools across the district.
2. The Custodial Services Department has continued with the procedure of requiring custodians to conduct bathroom inspections three times a day and submit weekly signed inspection forms to the central office. Site supervisors who do not submit these forms as required receive disciplinary letters. Although this process was initiated in November 2003, the Director of Custodial Services reports that it has not yet become systematic, and there are still many custodians who do not submit the forms each week. This policy continues to demand a significant amount of time from the director and custodians, and it is still not clear that it is improving restroom cleanliness. The number of maintenance referrals noted on these forms has increased, however, indicating that custodians may be inspecting more carefully. The division leadership team still hopes that over time, the restroom inspection process will become systematic, require less oversight, and result in improved restroom conditions. While it is to be commended for appropriately focusing on restroom cleanliness, the district should continue to monitor to determine whether the current approach is having enough of a measurable effect on restroom facilities to justify its continuation.

In addition to the bathroom inspection procedure, the Custodial Services Department is in the process of implementing two other initiatives to improve restroom and building conditions. These include piloting a team cleaning approach at four or five schools. This is intended to allow custodians to develop different skills and to ultimately increase custodial efficiency, accountability, and productivity. In addition, the department is initiating a comprehensive custodial training program in fall 2004.

In a meeting with custodians in August 2004, the State Administrator stated that the department should have four primary areas of focus this year: attendance, restrooms, grounds, and graffiti.

Standard Implemented: Partially

January 2000 Rating:	1
September 2003 Rating:	1
March 2004 Rating:	2
September 2004 Self-Rating:	4
September 2004 New Rating:	4



8.11 Facilities Maintenance and Custodial – Implementation of a Planned Program Maintenance System

Professional Standard

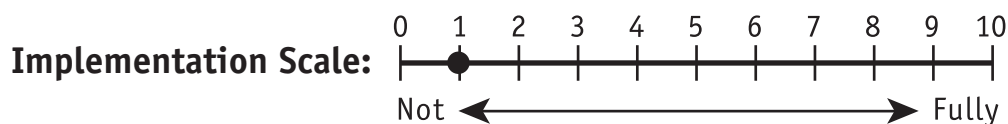
The district has implemented a Planned Program Maintenance System. The district should have a written Planned Program Maintenance System that includes an inventory of all facilities and equipment that will require maintenance and replacement. This program should include purchase prices, anticipated life expectancies, anticipated replacement time lines, and budgetary resources necessary to maintain the facilities.

Progress on Implementing the Recommendations of the Recovery Plan

1. The district does not yet have a written Planned Program Maintenance System. The Department of Buildings and Grounds has recently completed an inventory that identified and tagged all items of value within the district. The identification includes the serial number and type of equipment, but does not demarcate age, repair history, anticipated life expectancies, anticipated replacement time lines, or replacement costs. That research and documentation must still take place.
2. The district's current CMMS does not have the capacity to maintain comprehensive equipment inventory information. The district's current inventory of equipment is maintained in a separate database. As recommended in Standard 8.8 and 8.12, the district should consider a future allocation of funding to acquire a new CMMS. A more sophisticated system would be able to integrate inventory with life expectancies, costs and replacement schedules.
3. The Director of Buildings and Grounds has not yet prepared an annual report that projects anticipated equipment repairs and replacements for the next five years. The report should identify projected costs and other necessary resources with a clear action plan for making the identified improvements.

Standard Implemented: Partially

January 2000 Rating: 1
September 2003 Rating: 1
March 2004 Rating: 1
September 2004 Self-Rating: 1
September 2004 New Rating: 1



8.12 Facilities Maintenance and Custodial – Assignment of Work Orders

This standard has been added since the 2000 report.

Professional Standard

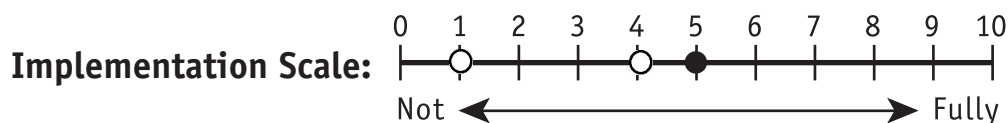
The district has a documented process for assigning routine work orders on a priority basis.

Progress on Implementing the Recommendations of the Recovery Plan

1. As noted previously, the district maintains a relatively limited CMMS. A more developed system would allow site administrators to track the status, time estimates, parts and materials linked to a particular work order. This will be increasingly important as the district implements site-based budgeting and oversight. Currently, RBB does not extend to maintenance needs, and all buildings and grounds services are funded from the Facilities Division budget. Under this system, the minimal capacities of the existing CMMS are acceptable. However, the current system does not allow the district to accurately job-cost, which eliminates the possibility of charging sites directly for the labor and materials they receive. If the district decides to extend RBB to maintenance services, it will need to consider making a special allocation to fund the acquisition of a more sophisticated CMMS.
2. The Department of Buildings and Grounds maintains a documented policy for prioritization of work orders, and an expectation of the time line for completion. It would still be helpful to provide the staff with detailed examples of the type of orders that fall into each level of priority. This will standardize the procedures and facilitate the training of new work control specialists. The Facilities Division is also in the process of implementing a new procedure and form for requesting nonroutine maintenance services.
3. The Director of Buildings and Grounds has plans to distribute the Buildings and Grounds Handbook and review work order procedures with principals at administrator orientation meetings prior to the beginning of the 2004-05 school year. Representatives from the department should also visit sites in fall 2004 to ensure that site office managers are familiar with the work order procedure.

Standard Implemented: Partially

January 2000 Rating:	Not Assessed
September 2003 Rating:	1
March 2004 Rating:	4
September 2004 Self-Rating:	5
September 2004 New Rating:	5



9.6 Instructional Program Issues – Plan to Maintain Equality/Equity of District Facilities

Legal Standard

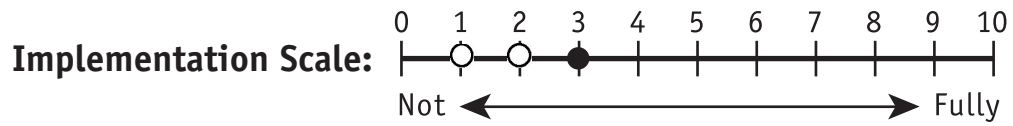
The district has developed and maintains a plan to ensure equality and equity of its facilities throughout the district [EC 35293].

Progress on Implementing the Recommendations of the Recovery Plan

1. In the absence of an updated Facilities Master Plan, the district continues to work on board-approved projects that were already underway at the time of state takeover, and projects prioritized by the State Administrator. The latter tend to be those projects that maximize state matching dollars, as well as those that align with the district's small schools initiative.
2. As noted elsewhere in this report, the district does not currently have a documented policy to guide decisions regarding prioritization of facilities projects. This must be an essential component of the updated Facilities Master Plan. Until a system is developed, documented and implemented, there will be no way to ensure that facilities decisions are made in an equitable manner. The Facilities Master Plan should include a ranking system that prioritizes projects, and decisions on project funding should be based on need, not geographic location or political interests.
3. As of the writing of this report, board policies had not yet been updated to address the prioritization of facilities projects. To ensure equity and unbiased decision-making, the district should consider revising board policy to stipulate how facilities projects should be prioritized. The decision-making process should be based on need, and guided by the ranking system to be outlined in the Facilities Master Plan.
4. Facilities funding will continue to be an issue for the district, as the needs exceed available bond and modernization funds. This is especially true in light of the additional needs resulting from the small schools initiative. The district should research all potential funding sources, including the possibility of an additional bond in the future.
5. As discussed in Standard 2.4, the district does not currently maintain an active Citizens Oversight Committee. The district should take immediate steps to create this committee with a cross-section of community members, and to establish clear policies and procedures for its function. This group can then assist the division and district with prioritizing future projects to assure equity and equality across all of the district's schools.

Standard Implemented: Partially

January 2000 Rating: 1
September 2003 Rating: 2
March 2004 Rating: 3
September 2004 Self-Rating: 3
September 2004 New Rating: 3



10.2 Community Use of Facilities – Compliance with Civic Center Act for Community Use

Professional Standard

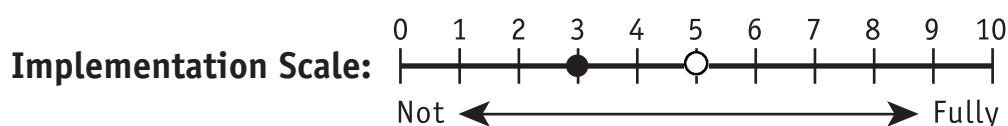
Education Code Section 38130 establishes terms and conditions of school facility use by community organizations, in the process requiring establishment of both “direct cost” and “fair market” rental rates, specifying what groups have which priorities and fee schedules.

Progress on Implementing the Recommendations of the Recovery Plan

1. No progress has been made with regard to researching or adjusting civic center rates for community usage. Rental rates have not been adjusted for many years, and the district is just beginning to review the fee schedule. As recommended in 2000, the district should ensure that a survey is conducted of similar facilities available for rent in the Oakland area in order to establish current “fair market” rental rates. The district also should research the current “direct costs” to the district that are associated with the use of facilities and, if deemed appropriate, revise, approve, and publish updated charges.
2. No progress has been made with regard to updating joint use agreements. The district has several joint facilities use agreements pertaining to several individual properties and partners. The policies established in these agreements are often not enforced and are in need of updating. The district should examine these policies, modify them as necessary, and implement procedures to ensure that they are enforced. The district may want to consider forming a joint powers authority with the city of Oakland and other partners to oversee joint use projects.
3. No progress has been made with regard to establishing a review schedule or reassigning civic center responsibilities to other staff members. As recommended in 2000, the district should establish a biannual schedule for review of civic center policies, procedures and forms, including fees and charges. The district should consider assigning this task to an individual other than the Director of Custodial Services, given his many other responsibilities.

Standard Implemented: Partially

January 2000 Rating:	5
September 2003 Rating:	3
March 2004 Rating:	3
September 2004 Self-Rating:	5
September 2004 New Rating:	3



11.3 Communication – Communication of District Standards and Plans

Professional Standard

The district should provide clear and comprehensive communication to staff of its standards and plans.

Progress on Implementing the Recommendations of the Recovery Plan

1. Newly developed maintenance standards have been shared with buildings and grounds staff. Custodial cleaning standards will be emphasized at trainings in fall 2004. Additionally, in August 2004, the State Administrator and Assistant Superintendent of Facilities and Planning met with the entire Custodial Services Department to communicate expectations and priorities for the 2004-05 school year. As the district moves forward with the master planning process, it will be important that all important parties are committed to the plan’s content and objectives.
2. Once initial training on the maintenance and custodial standards has been completed, supervisors should continue to conduct regular check-in sessions with the staff to ensure that staff members understand what is expected of them and are implementing standards as required.
3. The State Administrator continues to distribute a monthly districtwide staff newsletter entitled Staff Connections which includes some facilities-related issues. The Facilities Division also publishes a quarterly newsletter, which includes helpful information about events, activities, accomplishments and priorities. In addition, the division has recently updated its Web site, which includes samples of important documents in pdf form, announcements, information on specific projects, relevant links, and division contact information. While the content of the Web site could still be expanded, it is a positive step forward in the division’s efforts to communicate with its staff and the larger community.

Standard Implemented: Partially

January 2000 Rating:	0
September 2003 Rating:	2
March 2004 Rating:	3
September 2004 Self-Rating:	5
September 2004 New Rating:	5

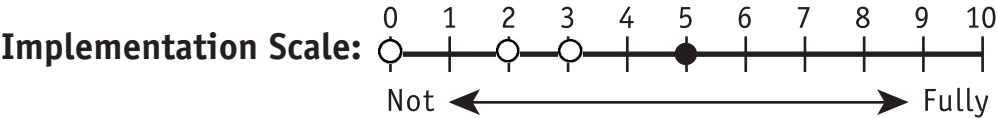


Table of Standards for Facilities Management

Standard to be addressed		Jan. 2000 rating	Sept. 2003 rating	March 2004 rating	Sept. 2004 rating
1.1	All school administrators should be thoroughly familiar with the California Department of Education, Civil Defense and Disaster Planning Guide for School Officials, 1972. [EC 32000-32004, 32040, 35295-35297, 38132, 46390-46392, 49505, GC 3100, 8607, CCR Title 5 §550, 560, Title 19 §2400]	8	8	NR	NR
1.2	The district includes the appropriate security devices in the design of new buildings as well as in modernized buildings. [EC 32020, 32211, 35294-35294.9, 39670-39675]	1	3	NR	NR
1.3	Demonstrate that a plan of security has been developed, which includes adequate measures of safety and protection of people and property. [EC 32020, 32211, 35294-35294.9] A comprehensive school safety plan exists for the prevention of campus crime and violence. [EC 35294-35294.9]	3	4	NR	NR
1.4	Ensure that the custodial and maintenance staff are regularly informed of restrictions pertaining to the storage and disposal of flammable or toxic materials. [EC 49341, 49401.5, 49411, F&AC 12981, H&SC 25163, 25500-25520, LC 6360-6363, CCR Title 8 §5194]	0	3	NR	NR
1.5	The district has a documented process for the issuance of master and sub-master keys. A districtwide standardized process for the issuance of keys to employees must be followed by all district administrators.	0	6	NR	NR
1.6	Bus loading and unloading areas, delivery areas, and parking and parent loading/unloading areas are monitored on a regular basis to ensure the safety of the students, staff and community. Students, employees and the public should feel safe at all times on school premises.	6	6	NR	NR
1.7	Outside lighting is properly placed and monitored on a regular basis to ensure the operability/adequacy of such lighting to ensure safety while activities are in progress in the evening hours. Outside lighting should provide sufficient illumination to allow for the safe passage of students and the public during after-hours activities. Lighting should also provide security personnel with sufficient illumination to observe any illegal activities on campus.	0	2	3	4
1.8	The district has a graffiti and vandalism abatement plan. The district should have a written graffiti and abatement plan that is followed by all district employees. The district provides district employees with sufficient resources to meet the requirements of the abatement plan.	3	1	1	1
1.9	Each public agency is required to have on file written plans describing procedures to be employed in case of emergency. [EC 32000-32004, 32040, 35295-35297, 38132, 46390-46392, 49505, GC 3100, 8607] [CCR Title 8, §3220]	5	5	NR	NR

The identified subset of standards appears in bold print. Narratives for these standards are provided in this report.
NR Indicates standard not reviewed

Standard to be addressed		Jan. 2000 rating	Sept. 2003 rating	March 2004 rating	Sept. 2004 rating
1.10	Each elementary and intermediate school at least once a month, and in each secondary school not less than twice every school year, shall conduct a fire drill. [EC 32000-32004, 32040, CCR Title 5 §550]	2	5	NR	NR
1.11	Maintenance/custodial personnel have knowledge of chemical compounds used in school programs that include the potential hazards and shelf life. [EC 49341, 49401.5, 49411, F&AC 12981, H&SC 25163, 25500-25520, LC 6360-6363, CCR Title 8 §5194]	0	3	NR	NR
1.12	Building examinations are performed, and required actions are taken by the governing board upon report of unsafe conditions. [EC 17367]	2	1	4	4
1.13	Each school which is entirely enclosed by a fence or partial buildings must have a gate of sufficient size to permit the entrance of ambulances, police and fire fighting equipment. Locking devices shall be designed to permit ready entrance.	10	10	NR	NR
1.14	Sanitary, neat and clean conditions of the school premises exist and the premises are free from conditions that would create a fire hazard. [CCR Title 5 §633]	1	1	4	5
1.15	The Injury and Illness Prevention Program (IIPP) requires periodic inspections of facilities to identify conditions. [CCR Title 8 §3203]	0	0	NR	NR
1.16	Appropriate fire extinguishers exist in each building and current inspection information is available. [CCR Title 8 §1922(a)]	5	4	4	4
1.17	All exits are free of obstructions. [CCR Title 8 §3219]	5	5	NR	NR
1.18	Requirements are followed pertaining to underground storage tanks. [H&SC 25292, CCR Title 26 §477, Title 23 §2610]	10	10	NR	NR
1.19	All asbestos inspection and asbestos work completed in the US is performed by Asbestos Hazard Emergency Response Act (AHERA) accredited individuals. [EC 49410.5, 40 CFR Part 763]	5	7	NR	NR
1.20	All playground equipment meets safety code regulations and is inspected in a timely fashion as to ensure the safety of the students. [EC 44807, GC 810-996.6, H&SC 24450 Chapter 4.5, 115725- 115750, PRC 5411, CCR Title 5 §5552]	2	2	NR	NR
1.21	Safe work practices exist with regard to boiler and fired pressure vessels. [CCR Title 8 §782]	7	10	NR	NR
1.22	Materials Safety Data Sheets are maintained. [EC 49341, 49401.5, 49411, F&AC 12981, LC 6360- 6363, CCR Title 8 §5194]	1	2	NR	NR

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Standard to be addressed		Jan. 2000 rating	Sept. 2003 rating	March 2004 rating	Sept. 2004 rating
1.23	The district maintains a comprehensive employee safety program. Employees are made aware of the district safety program and the district provides in-service training to employees on the requirements of the safety program.	3	3	NR	NR
1.24	The district conducts periodic safety training for employees. District employees should receive periodic training on the safety procedures of the district.	2	3	3	5
1.25	The district should conduct periodic first aid training for employees assigned to school sites.	2	1	NR	NR
2.1	The district should have a long-range school facilities master plan.	4	2	3	4
2.2	The district should possess a California State Department of Education Facilities Planning and Construction Guide (dated 1991).	10	10	NR	NR
2.3	The district should seek state and local funds.	7	6	NR	NR
2.4	The district has created a Citizens Oversight Committee to ensure the appropriateness of expenditures related to the recent passage of the district's local school bond measure (Measure M). This committee will function as an advisory facility planning committee. (Reworded since the 2000 report.)	1	0	4	3
2.5	The district should have a properly staffed and funded facility planning department.	1	4	NR	NR
2.6	The district should develop and implement an annual capital planning budget.	1	2	3	5
2.7	The district should have standards for real property acquisition and disposal. [EC 39006, 17230- 17233]	5	5	NR	NR
2.8	The district seeks and obtains waivers from the State Allocation Board for continued use of its non-conforming facilities. [EC 17284, 17285]	2	4	NR	NR
2.9	The district has established and utilizes a selection process for the selection of licensed architectural/engineering services. [GC 17302]	6	5	NR	NR
2.10	The district should assess its local bonding capacity. [EC 15100]	10	10	NR	NR
2.11	The district should develop a process to determine debt capacity.	4	4	NR	NR
2.12	The district should be aware of and monitor the assessed valuation of taxable property within its boundaries.	10	6	NR	NR
2.13	The district should monitor its legal bonding limits. [EC 15100, 15330]	10	10	NR	NR
2.14	The district should collect statutory school fees. [EC 17620, GC 65995, 66000]	10	4	NR	NR

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Standard to be addressed		Jan. 2000 rating	Sept. 2003 rating	March 2004 rating	Sept. 2004 rating
2.15	The district should consider developing an asset management plan.	3	1	NR	NR
2.16	The district has pursued state funding for joint-use projects through the filing of applications through the Office of Public School Construction and the State Allocation Board.	N/A	3	NR	NR
2.17	The district has established and utilizes an organized methodology of prioritizing and scheduling projects. (Added since the 2000 report.)	New	1	3	3
2.18	The district should distribute facility funding in an equitable manner to all communities served and to all school levels. (Added since the 2000 report.)	New	1	3	3
3.1	The district has a restricted deferred maintenance fund and those funds are expended for maintenance purposes only. The deferred maintenance fund should be a stand-alone fund reflecting the revenues and expenses for the major maintenance projects accomplished during the year.	6	4	NR	NR
3.2	The district has pursued state funding for deferred maintenance - critical hardship needs by filing an application(s) through the Office of Public School Construction and the State Allocation Board. [State Allocation Board Regulation §1866]	Not rated	5	NR	NR
3.3	The district applies to the State Allocation Board for facilities funding for all applicable projects.	4	5	NR	NR
3.4	The district consistently reviews and monitors its eligibility for state funding so as to capitalize upon maximal funding opportunities.	7	7	NR	NR
3.5	The district establishes and implements interim housing plans for use during the construction phase of modernization projects and/or additions to existing facilities.	10	10	NR	NR
3.6	The district has established and maintains a system for tracking the progress of individual projects.	1	7	NR	NR
3.7	Furniture and equipment items are routinely included within the scope of modernization projects.	10	10	NR	NR
3.8	The district obtains approval of plans and specification from the Division of the State Architect and the Office of Public School Construction (when required) prior to the award of a contract to the lowest, responsible bidder. [EC 17263, 17267]	10	8	NR	NR
3.9	All relocatables in use throughout the district meet statutory requirements. [EC 17292]	3	3	NR	NR
3.10	The district maintains a plan for the maintenance and modernization of its facilities. [EC 17366]	1	1	3	4

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Standard to be addressed		Jan. 2000 rating	Sept. 2003 rating	March 2004 rating	Sept. 2004 rating
3.11	The annual deferred maintenance contribution is made correctly. The district should annually transfer the maximum amount that the district would be eligible for in matching funds from the state.	10	10	NR	NR
3.12	The district actively manages the deferred maintenance projects. The district should review the five-year deferred maintenance plan annually to remove any completed projects and include any newly eligible projects. The district should also verify that the projects performed during the year were included in the state-approved, five-year deferred maintenance plan.	1	1	5	6
3.13	Staff within the district is knowledgeable of procedures within the Office of Public School Construction (OPSC).	8	8	NR	NR
3.14	Staff within the district is knowledgeable of procedures within the Division of the State Architect (DSA).	10	8	NR	NR
4.1	The district maintains an appropriate structure for the effective management of its construction projects.	1	6	NR	NR
4.2	Change orders are processed and receive prior approval from required parties before being implemented within respective construction projects.	0	3	NR	NR
4.3	The district maintains appropriate project records and drawings.	6	4	NR	NR
4.4	Each Inspector of Record (IOR) assignment is properly approved.	10	7	NR	NR
5.1	The district complies with formal bidding procedures. [GC 54202, 54204, PCC 20111]	10	10	NR	NR
5.2	The district has a procedure for requests for quotes/proposals. [GC 54202, 54204, PCC 20111]	5	10	NR	NR
5.3	The district maintains files of conflict of interest statements and complies with legal requirements. Conflict of interest statements should be collected annually and kept on file.	8	6	NR	NR
5.4	The district ensures that biddable plans and specifications are developed through its licensed architects/engineers for respective construction projects.	1	5	NR	NR
5.5	The district ensures that requests for progress payments are carefully evaluated.	6	6	NR	NR
5.6	The district maintains contract award/appeal processes. [GC 54202, 54204, PCC 20111]	10	10	NR	NR
5.7	The district maintains internal control, security, and confidentiality over the bid submission and award processes. [GC 54202, 54204, PCC 20111] (Added since the 2000 report.)	New	10	NR	NR
6.1	The district complies with California Department of Education (CDE) requirements relative to the provision of Special Education facilities.	5	5	NR	NR

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Standard to be addressed		Jan. 2000 rating	Sept. 2003 rating	March 2004 rating	Sept. 2004 rating
6.2	The district provides facilities for its Special Education programs which ensure equity with other educational programs within the district and provides appropriate learning environments in relation to educational program needs.	3	3	NR	NR
6.3	The district provides facilities for its Special Education programs which provide appropriate learning environments in relation to educational program needs.	2	3	4	5
7.1	The district applies for state funding for class size reduction facilities. The district should apply for class size reduction facilities funding annually.	10	Not rated	NR	NR
7.2	The district has provided adequate facilities for the additional classes resulting from the implementation of Class Size Reduction (CSR).	4	6	NR	NR
7.3	The district has complied with CDE suggested space requirements relative to the provision of educational environments for the implementation of Class Size Reduction (CSR).	7	7	NR	NR
7.4	The district has developed a plan for the provision of permanent facilities in which to house its CSR programs.	3	4	NR	NR
8.1	An Energy Conservation Policy should be approved by the board of education and implemented throughout the district. (Reworded since the 2000 report.)	10	1	NR	NR
8.2	An energy analysis should be completed for each site. (Reworded since the 2000 report.)	10	0	NR	NR
8.3	The district should create and maintain a system to track utility costs and consumption and to report on the success of the district's energy program. (Added since the 2000 report.)	New	0	2	2
8.4	Cost-effective, energy-efficient design should be a top priority for all district construction projects. (Reworded since the 2000 report.)	1	6	NR	NR
8.4a	The district should be in discussion and working as a team with agencies that can provide professional assistance and funding. (Added since the 2000 report.)	New	4	NR	NR
8.4b	The district should act toward improving the energy efficiency of all sites, including those not included in the local bond. (Added since the 2000 report.)	New	2	NR	NR
8.4c	The district should analyze the possibility of using alternative energy sources as a means to reducing the financial impact of utilities on the district. (Added since the 2000 report.)	New	7	NR	NR

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Standard to be addressed		Jan. 2000 rating	Sept. 2003 rating	March 2004 rating	Sept. 2004 rating
8.5	Adequate maintenance records and reports are kept, including a complete inventory of supplies, materials, tools and equipment. All employees required to perform maintenance on school sites should be provided with adequate supplies, equipment and training to perform maintenance tasks in a timely and professional manner. Included in the training is how to inventory supplies and equipment and when to order or replenish them.	2	1	3	4
8.6	Major areas of custodial and maintenance responsibilities and specific jobs to be performed have been identified. Custodial and maintenance personnel should have written job descriptions that delineate the major areas of responsibilities that they will be expected to perform and will be evaluated on.	1	2	NR	NR
8.6a	Procedures are in place for evaluating the work quality of custodial staff. The quality of the work performed by the custodial staff should be evaluated on a regular basis using a board-adopted procedure that delineates the areas of evaluation and the types of work to be evaluated.	1	1	1	3
8.6b	Procedures are in place for evaluating the work quality of maintenance and operations staff. The quality of the work performed by the maintenance and operations staff should be evaluated on a regular basis using a board-adopted procedure that delineates the areas of evaluation and the types of work to be evaluated.	2	0	3	3
8.7	Necessary staff, supplies, tools and equipment for the proper care and cleaning of the school(s) are available. In order to meet expectations, schools must be adequately staffed and staff must be provided with the necessary supplies, tools and equipment as well as the training associated with the proper use of such.	2	1	NR	NR
8.8	The district has an effective preventive maintenance program. The district should have a written preventive maintenance program that is scheduled and followed by the maintenance staff. This program should include verification of the completion of work by the supervisor of the maintenance staff.	1	1	1	1
8.9/ 8.10	Toilet facilities are adequate and maintained. All buildings and grounds are maintained. [CCR Title 5 § 631] (Reworded/combined since the 2000 report.)	1	1	2	4

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Standard to be addressed		Jan. 2000 rating	Sept. 2003 rating	March 2004 rating	Sept. 2004 rating
8.11	The district has implemented a planned program maintenance system. The district should have a written planned program maintenance system that includes an inventory of all facilities and equipment that will require maintenance and replacement. This program should include purchase prices, anticipated life expectancies, anticipated replacement timelines and budgetary resources necessary to maintain the facilities.	1	1	1	1
8.12	The district has a documented process for assigning routine repair work orders on a priority basis. (Added since the 2000 report.)	New	1	4	5
9.1	The district has developed a plan for attractively landscaped facilities.	8	1	NR	NR
9.2	The goals and objectives of the technology plan should be clearly defined. The plan should include both the administrative and instructional technology systems. There should be a summary of the costs of each objective and a financing plan should be in place.	7	2	NR	NR
9.3	The governing board shall provide a warm, healthful place in which children who bring their own lunches to school may eat their lunch. [EC 17573, CCR Title 5 §14030]	7	8	NR	NR
9.4	The governing board of every school district shall provide clean and operable flush toilets for the use of pupils. [EC 17576, CCR Title 5 §14030]	7	8	NR	NR
9.5	The district has plans for the provision of extended-day programs within its respective school sites. [EC 17264]	8	8	NR	NR
9.6	The district has developed and maintains a plan to ensure equality and equity of its facilities throughout the district. [EC 35293]	1	2	3	3
9.7	All schools shall have adequate heating and ventilation.	1	5	NR	NR
9.8	All schools shall have adequate lighting and electrical service.	7	7	NR	NR
9.9	Classrooms are free of noise and other barriers to instruction. [EC 32212]	10	6	NR	NR
9.10	The learning environments provided within respective school sites within the district are conducive to high quality teaching and learning.	1	5	NR	NR
9.11	Facilities within the district reflect the standards and expectations established by the community.	2	2	NR	NR
10.1	The district should have a plan to promote community involvement in schools.	10	10	NR	NR
10.2	Education Code Section 38130 establishes terms and condition of school facility use by community organizations, in the process requiring establishment of both “direct cost” and “fair market” rental rates, specifying what groups have which priorities and fee schedules.	5	3	3	3

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Standard to be addressed		Jan. 2000 rating	Sept. 2003 rating	March 2004 rating	Sept. 2004 rating
10.3	Districts should maintain comprehensive records and controls on civic center implementation and cash management.	2	2	NR	NR
11.1	The district's public information office should coordinate a full appraisal to students, staff and community of the condition of the district's facilities.	10	5	NR	NR
11.2	The district should apprise students, staff and community of efforts to rectify any substandard conditions.	8	4	NR	NR
11.3	The district should provide clear and comprehensive communication to staff of its standards and plans.	0	2	3	5
11.4	All stakeholder groups should be directly involved in a meaningful manner regarding the district's facilities.	8	3	NR	NR

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