

SAN DIEGO UNIFIED SCHOOL DISTRICT
Office of the Superintendent
MAJOR REPAIR AND REPLACEMENT/REPAIR AND REPLACEMENT
FISCAL YEAR 2011 IMPLEMENTATION PLAN

The Major Repair and Replacement/Repair and Replacement (MRR/RR) Program accomplishes high value and long term repairs and maintenance at our school facilities. It is a complex program. This report is organized into the following sections to better understand the details:

- The **Fiscal Information/Funding Sources** section with a historical overview, funding background, and Proposition S fiscal impact.
- A **District Facilities** overview with an explanation of the Facility Condition Index (FCI) and the Facility Condition Assessment (FCA).
- Our **New Approach to Facilities Maintenance**, which enhances the Five Year Plan by leveraging Williams/SARC inspections.
- The **MRR/RR Program** with definitions, the Fiscal Year (FY) 2011 Plan, and associated maintenance categories.
- A **Summary** with action items.
- **Attachments and Supporting Documents**
 - Attachment A - Proposition S Funding Chart
 - Attachment B - Facilities Table
 - Attachment C - FCI Chart
 - Attachment D - Fiscal Year 2011 MRR/RR Project Chart
 - DM Project List
 - Fiscal Year 2010 MRR/RR Project Chart
 - June 1, 2010 Board of Education Workshop PowerPoint Presentation
 - Facility Inspection Tool (FIT) Form for Williams/SARC Inspections
 - Supplementary Worksheet for Facility Condition Assessments (FCA)

FISCAL INFORMATION/FUNDING SOURCES

Proper care of the district's buildings and grounds is a significant financial responsibility. This section is an overview of MRR/RR funding.

Funding Sources:

Historically, funding for maintenance, particularly MRR/RR, has been challenging for public school districts. During the late 1980's through the mid 1990's, the principal funding source for

major maintenance was the State Deferred Maintenance (DM) program. In recent history, bond measures such as Proposition MM have provided substantial funding for MRR/RR work. Since 2007, the PPO annual plan for MRR/RR has been funded at \$25 million; \$20 million in district funds and \$5 million from state DM funding.

Proposition MM spent \$370 million on MRR/RR, which improved the Facility Condition Index (defined later in the report) by 8 percent. Proposition MM bonds will not be retired until 2029 with a debt service amount of \$24.3 million per year. Between 1998 and 2009, a combined annual average contribution of \$24.2 million in district and Proposition MM funds were spent on MRR/RR.

It is important to note that the State DM program is a funding source for approximately 20% of the MRR/RR plan. This program, is intended to supplement facility maintenance needs. However, since it is not based on an evaluation of needed repairs, but rather is a complex calculation derived from available state and local funding, the funding amount varies and is not certain. Submittal and state approval of a DM Five Year Plan is a precondition for the district obtaining state deferred maintenance matching funds, and this qualifying project list for DM funding will be a part of the annual Board MRR/RR report, and is attached to this report.

Due to less stringent criteria during current state funding deficits, state DM program funding can be used for general funds. Because past state practices have funded qualified projects retroactively, the district continues to submit maintenance projects in anticipation of obtaining those funds at a later date. Presently, the district is funding the DM portion with other resources.

Proposition S

During initial planning for Proposition S, MRR/RR deficiencies were identified at each school facility. Repairs for these deficiencies were included in the bond measure as part of a ten-year whole-site modernization and capital improvement project. PPO will complete the RR portion of the work at \$19 million annually. Total MRR/RR funding within Proposition S is \$501 million and will be expended through the life of the bond program. The original ten year funding timeframe for MRR/RR (See Attachment A) has been extended to sixteen years due to a drop in the district's assessed valuation of real property, which means a slowing of incoming funding. As a result of this schedule extension, many MRR/RR deficiencies identified under Proposition S may not be corrected as the facility condition indicates, and may require allocating other PPO funding to provide interim repairs. PPO is currently working with Proposition S Project Managers to optimize the effectiveness of the MRR effort, funded by both PPO budgets and Proposition S, and to ensure that new or reconfigured systems installed are maintainable systems.

DISTRICT FACILITIES

Facilities Overview:

The district's inventory of buildings includes 14.77 million square feet of buildings with a current replacement cost of \$4.08 billion, and encompasses two primary building classifications:

- 1) 12.42 million square feet of permanent structures with an average age of 39 years, and
- 2) 2.35 million square feet of temporary (portable or movable) buildings with an average age of 48 years.

Attachment B provides specific summarized data of the district's buildings.

The term "facility" as used in this report, is referencing all fixed assets within the district's property line. There are grounds with parking lots, lunch courts, playgrounds, etc., along with underground water and sewer systems, electrical systems, communication systems.

The large inventory of buildings is situated on 2,600 acres of developed property. In total, the district owns over 3000 acres of property in San Diego County.

Facility Condition Assessment (FCA) and Facility Condition Index (FCI)

Beginning in FY2012, PPO will be able to offer a more rigorous and accurate indicator of facility condition by inspecting, verifying and calculating the FCI. By revitalizing the previously conducted FCA's and utilizing our new Computerized Maintenance Management System (TMA Systems) to provide real-time data, PPO will continually improve the information and data to gauge the district's physical condition and update the FCI more frequently. FCA is a continuous process due to the large number of systems and facilities and changing conditions.

The FCI is calculated by dividing the total amount of maintenance needs by the total Current Replacement Value (CRV) of all district facilities; the lower the number, the better the condition of the facility.

On July 8, 2008, a Board Report set a goal of achieving a district average FCI of 5% to 7% by 2018. As depicted by Attachment C, the projected FCI has been annually benchmarked. Since funding for Proposition S is being extended from ten to sixteen years, the chart reflects an FCI percentage increase because of the anticipated decline in district facility conditions.

As part of a fresh maintenance approach, PPO will be using and supplementing data gained from a 2008 state inspection requirement for the purpose of fulfilling School Accountability Report Card (SARC) and Williams Act legislation.

NEW APPROACH TO FACILITIES MAINTENANCE

To ensure the MRR/RR program is most effective when addressing facility maintenance and repairs, PPO has initiated a more detailed monitoring mechanism for assuring timely completion of scheduled MRR/RR work. This will be accomplished by a multifaceted approach:

- Using a MRR/RR rolling five year plan in which the current fiscal year is annually implemented and an additional plan year is added.
 - This will enhance PPO’s ability to plan long-range with a higher level of certainty and places as much work as possible in a program framework that is based on component service life.
 - Many building element’s maintenance requirements can be planned with a high level of accuracy based on service life, such as painting, asphalt re-sealing, etc. This creates the known set of projects to implement and complete each fiscal year.
- Comprehensive Facility Condition Assessments (FCA) in FY2011 of ten district sites, with increasing numbers of sites every year thereafter, using the following tools:
 - Williams/SARC – updated annually by PPO.
 - FPC FCA reports - updated 2009/2010, 33 sites were inspected and documented.
 - PPO FCA reports – existing data collected between 2002 and 2005 of all District sites.
 - Data analysis from TMA – the core maintenance management system used by PPO.
- An MRR/RR plan by program that is incorporated in the 5 year rolling plan that includes all sites. Intended enhancements include:
 - In place for 2011 planning: 20 year roof replacement program, a 7 year exterior paint program, annual concrete program, 10 year interior lighting program and a 4 year asphalt re-seal program.
 - Expected for 2012 planning: fencing, playground equipment, HVAC, electrical, plumbing, and irrigation systems.
 - Expected for 2013 planning: windows, plumbing fixtures, fire system controls, and concrete.
 - The rolling 5-year plan will be dynamic in nature. Utilizing TMA, a quarterly report will be available to monitor progress, both in cost and materials installed.
- Revamping of the FCA process as discussed in the next section.

Leveraging Williams/SARC Inspections for Facility Condition Assessments

There are various ways to measure the current condition of District facilities. In California, it is mandated to have the facility evaluation component of the Williams Act/SARC survey updated annually. This rating is an indication that the facilities meet the state standards and district policy for a safe and functional educational facility. In 2009, the Williams/SARC survey rated the district facilities an overall “good”. This is the second highest possible rating for the survey with “exceptional” as the highest possible rating. A recent, more stringent interpretation of Williams/SARC inspection requirements by the San Diego County Office of Education (SDCOE) requires a more detailed room-by-room evaluation.

Compliance with the more stringent criteria can be leveraged to enhance PPO’s current FCA process and allow better data to be obtained to analyze district facilities and contribute to the accuracy of the MRR/RR plan. As district staff assess facilities for the FCA and simultaneously for Williams/SARC requirements, the same information will be used to verify the accuracy of program data.

For FY2011, the following enhancements will occur:

- PPO personnel will be inspecting 100% of our facilities.
- Inspections will occur throughout the year, rather than being “lumped” into a 3-month timeframe.
- The Williams/SARC points of inspection and criteria, as reported on the Facility Inspection Template (FIT) will now include supplemental Key Performance Indicators (KPI).

MRR/RR PROGRAM

MRR/RR Program Definitions

- The MRR portion of the program includes building systems with a service life greater than or equal to 20 years, for example HVAC systems, doors/windows, storm/sanitary sewer, electrical distribution.
- The RR portion of the program includes building systems having a service life of less than 20 years, for example exterior paint, flooring, asphalt seal, lighting, irrigation systems, signal systems.

FY2011 MRR/RR Plan

The MRR/RR program includes electrical, signal systems, grounds, plumbing, general and mechanical project categories. This year’s MRR/RR plan contains approximately 198 projects at 127 district sites. Attachment D provides additional detail. The projects when analyzed and placed into the two redefined policy categories are:

- MRR: estimated value of \$8.4 million.
- RR: estimated value of \$15.3 million.

The following FY2011 MRR/RR plan items are identified for specific sites:

Electrical	Grounds	Plumbing	General	Signal Systems	Mechanical	Total
359,000	8,067,000	821,000	3,676,000	1,984,000	2,666,000	17,573,000

The following FY2011 MRR/RR plan program items are for sites not yet identified:

Electrical	Grounds	Plumbing	General	Signal Systems	Mechanical	Total
752,000	743,000	1,108,000	2,888,000	292,000	502,000	6,285,000

These projects were identified through repair history and repair trade reporting, age and condition analysis by planning staff, school site feedback, and proper prioritization of all district needs in the MRR/RR category.

This allocation provides a FY2011 MRR/RR total program cost of **\$23,858,000, intentionally providing \$1,142,000** for emergent and/or emergency work.

A portion of the MRR/RR budget remains uncommitted so PPO may respond to unforeseen conditions. As the fiscal year progresses, this amount will be adjusted quarterly to maximize installed, in-place work.

Maintenance Categories

The components maintained under the MRR/RR Program are divided into two major areas; buildings and grounds. Under these two headings there are major subcomponents and systems:

Buildings

Electrical - The majority of these electrical projects are lighting, fixture replacement and electrical distribution.

- Lighting retrofit/upgrades replaces interior and exterior light fixtures and lamps with more energy efficient technologies.
- Upgrades may also provide capability to centrally control lighting use for specific areas within a site; gymnasiums as an example.
- Electrical distribution would cover our “point of connection” from SDG&E to sub panels located throughout the facility and the associated underground/overhead distribution system connecting them.

Plumbing - This includes re-piping work of many types: water line replacement or backflow upgrades, storm water conveyance and related drainage system improvement, sewer line replacement and gas line replacement where identified. Updates to restroom fixtures and drinking fountains are also planned for various sites.

General - The “General” trade category includes carpentry, roof, and paint and other projects.

- Projects in the carpentry area are door and lock replacements, cabinetry, etc.
- Roof replacements are in the plan for FY2011 as the priority of facility and asset preservation.
- Plastering, interior painting and asbestos management of these facilities is included.
- Exterior paint is a sub program of the General trade category.
 - The life expectancy of the typical exterior paint system is six to seven years.

- Through a consistent, proactive exterior paint program, associated building components are preserved; damaged components are identified and replaced, maintaining building integrity as well as improving site appearance.
- The FY2011 MRR/RR plan includes painting 25 sites at a value of \$2 million utilizing in-house crews, sustaining a rate of at least 25 sites per year ensures that all District sites will be repainted on a 7-year cycle.

Low Voltage - Projects in this category include upgrades to HVAC equipment controls, outside lighting controls, sprinkler controls, fire and intrusion alarm systems, audio/visual systems, master clock/bell systems and intercom systems.

Mechanical - The district has heating and air conditioning systems needing replacement and upgrades. Sheet metal ductwork, filter work and some gas line replacement occur in these projects. Certain hydronic systems will be included in the plan for repair and replacement as well as other heating systems.

Grounds

This includes repair or replacement of asphalt paving, concrete and related masonry systems, playground equipment, irrigation, fencing and gates.

PPO maintains 21 million square feet of asphalt through an annual plan of seal coating and line-striping on a 4-year asphalt cycle. This sub-category is predictable and a cost-effective method of asset preservation. This year's MRR/RR plan restores and extends the life expectancy of five million square feet of asphalt and will improve the appearance of 52 sites. Planned work is primarily delivered through in-house crews with augmented support by vendors. This year's planned value of asphalt seal and re-stripe projects at 58 district facilities is \$2.3 million.

FY2010 MRR/RR Plan Status

The FY2010 MRR/RR report to the Board of Education presented a summary of 502 projects to be delivered to 161 district facilities, estimated value \$21.1 million. PPO has completed approximately 70% of these projects to date. Projects not included in the original summary and emergent projects were also initiated and completed. The cost to complete projects started but not completed in FY2010 will be carried over and funded by the FY2011 MRR/RR budget.

Other Operational Maintenance Programs

Routine or Repair Maintenance, and Planned or Preventive Maintenance comprises daily activities that ensure fully operational schools and protects district assets.

Routine/Repair Maintenance is defined as minor repairs to facilities that keep the facility in operational condition. These repairs include responses to breakdowns, normal wear and tear, and vandalism.

- By analysis of FY2010 repairs, PPO projects a response to 61,000 work orders at a cost of \$15.3 million.
- In FY2009, PPO responded to 43,085 work orders at a cost of \$15.1 million.

The Preventive Maintenance (PM) Program is a proactive, cost-effective vehicle designed to optimize system performance and reduce unscheduled repair maintenance calls. The intrinsic value of PM can be measured by a reduction of service calls and routine repair work later.

- PM lessens the impact upon sites that occurs during unscheduled system downtime and repair.
- PPO evaluates current PM tasks and seeks additional PM opportunities to ensure maximum return on investment from district assets. Considerations of PM costs vs. equipment replacement costs are integral in the evaluation of proposed PM opportunities.
- The PM program for FY2010 is projected to complete 27,000 work orders at a cost of \$2.5 million.
- In FY2009, PPO addressed 9,349 work orders at a cost of \$2.6 million.

SUMMARY

The MRR/RR plan is one component of PPO's total operational plan comprising the overall facility care approach for maintaining district facilities. The FY2011 MRR/RR plan represents the beginning of a multi-year paradigm shift to consider a total program approach of all operational maintenance programs. Even in this first year, the program approach allows PPO to make best use of available resources to maintain facilities in the most optimal condition possible.

Effectiveness will be determined by continuously assessing the current condition of facilities and comparing this with the goals delineated in this report. Ongoing assessment of district facilities will be conducted by planning professionals that visit every site in the district every year. They will review and prioritize facility needs, perform facility condition inspections, and take a holistic approach to all maintenance items identified at each facility.

This report has been presented to the standing Independent Citizens Oversight Committee (ICOC) for review and collaboration. The ICOC represents the integral interests of school district taxpayers, ensuring the district addresses and protects its assets by offering independent assessment and information regarding this needed investment.

Additionally, this report continues the multi-year transition to improved reporting required by district policy. District staff and consultants continue to work toward complete integration of the MRR/RR program with all district facility programs.

Moving toward improved Facility Condition Index is a complex task. The district currently has many challenges, one of which is continuing the good stewardship of the largest district asset: the grounds and buildings of the district.

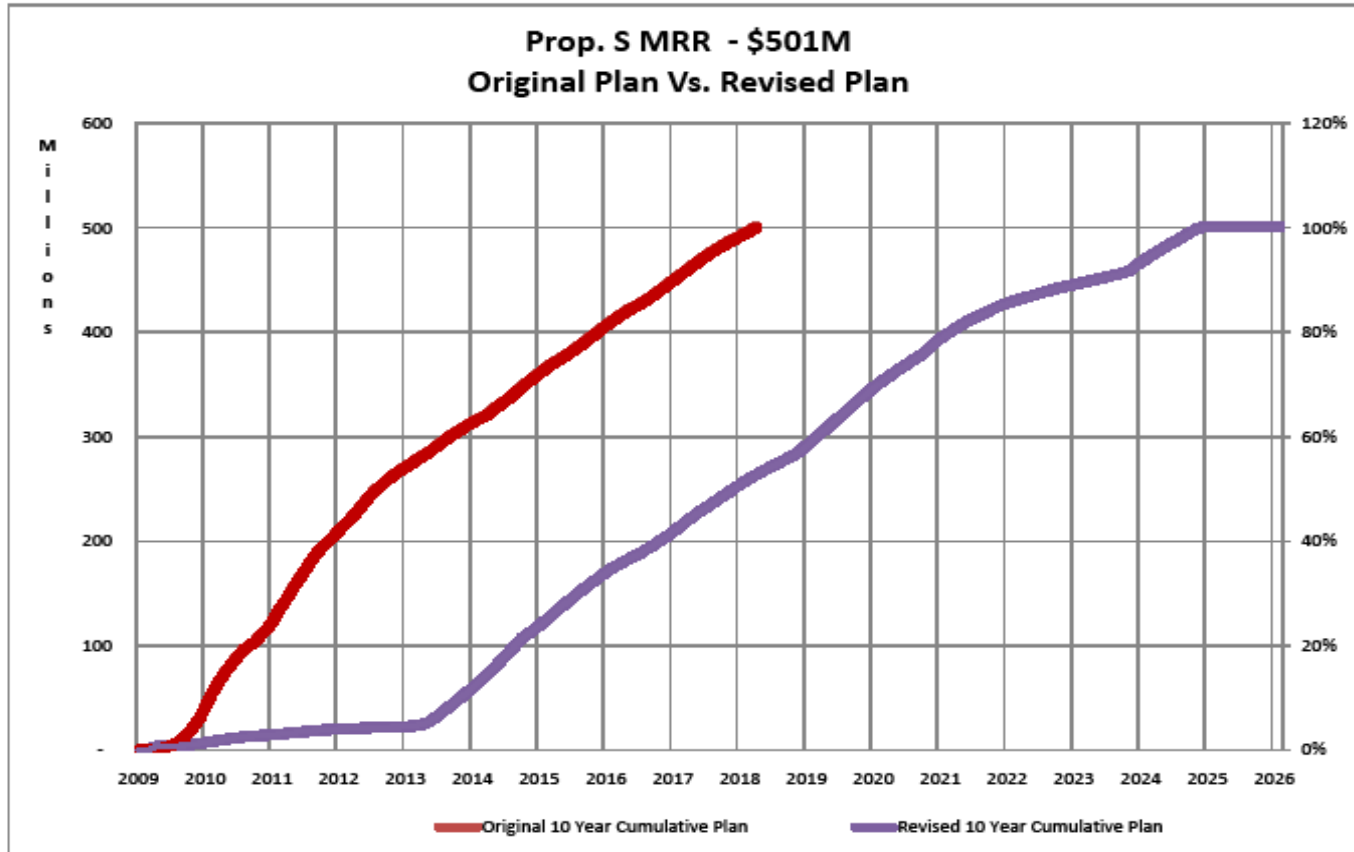
The facilities are the place where the educational process occurs. Physical plant staff continues to improve the condition of our schools to reflect the district commitment to providing an exceptional learning environment for all our students.

PPO Action Items

PPO Action Items for FY2011:

- Complete MRR/RR plan as defined.
- Provide MRR/RR Plan status updates quarterly to ICOC.
- Perform 10 comprehensive FCA's.
- Conduct professional FCA and Williams/SARC inspections at all 200 facilities.
- Report actual FCI derived from annual FCA results compared to the projected FCI Graph as represented in FY2010 MRR/RR Plan.
- Update future FCI projections based on current results.

Attachment A



Attachment B

MRR/RR Report
June 25, 2010

Age	Building Type	Quantity	Square Footage
1940 and older	Perm	43	233,186
1941 to 1950	Perm	93	896,013
1951 to 1960	Perm	444	3,226,344
1961 to 1970	Perm	272	2,148,921
1971 to 1980	Perm	227	2,485,467
1981 to 1990	Perm	48	438,334
1991 to 2000	Perm	136	1,204,090
2001 to 2009	Perm*	246	1,793,073
		1,509	12,425,428

Age	Building Type	Quantity	Square Footage
1940 and older	Relo*	0	0
1941 to 1950	Relo*	0	0
1961 to 1970	Relo*	13	12,000
1981 to 1990	Relo	41	43,578
1991 to 2000	Relo*	157	233,589
2001 to 2009	Relo*	171	160,200
		382	449,367

Legend	
Perm	Permanent buildings
Portable	District Built Portable Classrooms
Relo	Pre-fabricated Classroom Building
Trailer	Trailer

*denotes a change in number of buildings for this year

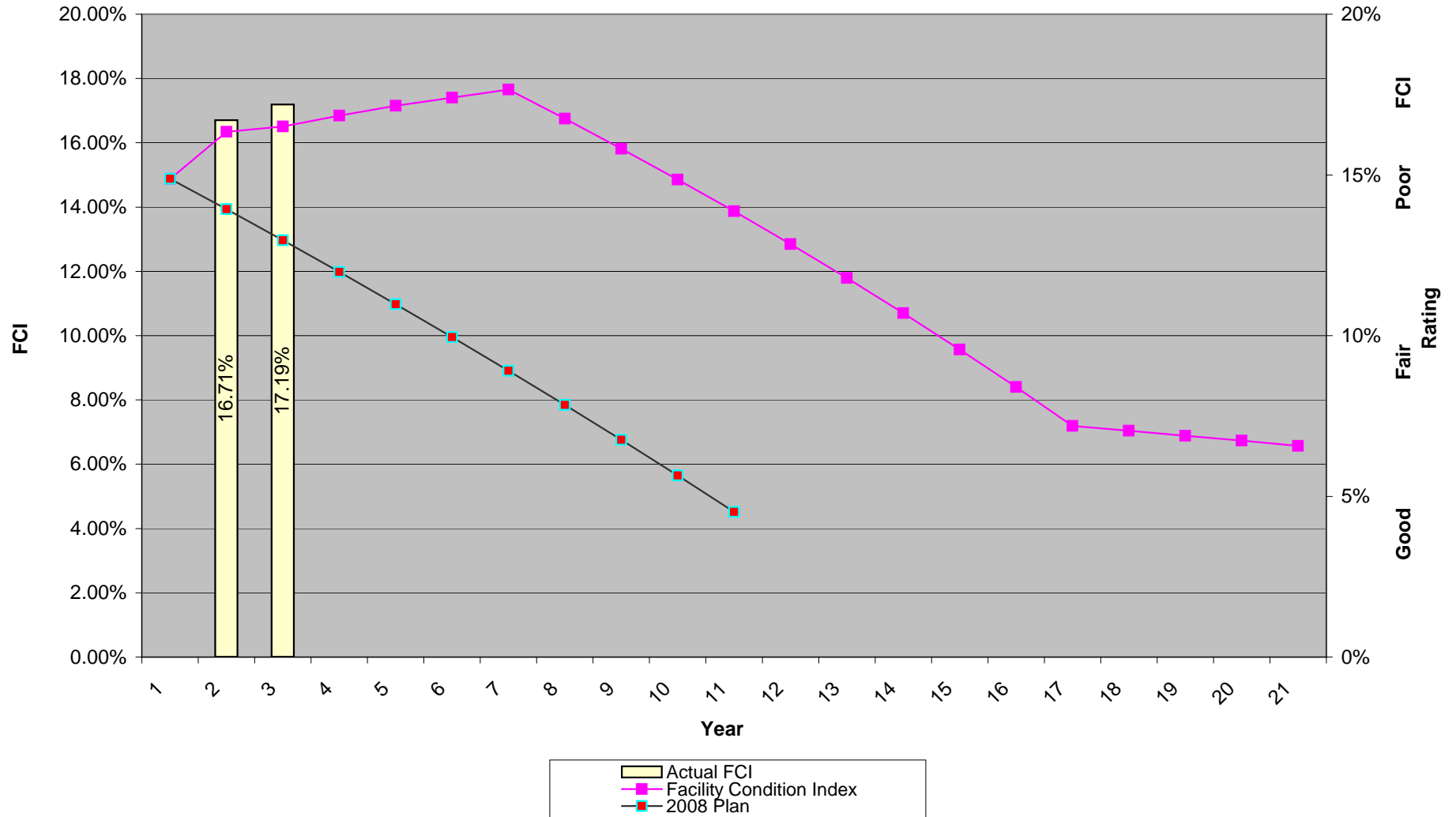
Age	Building Type	Quantity	Square Footage
1940 and older	Port*	17	16,936
1941 to 1950	Port*	43	41,824
1951 to 1960	Port*	344	330,248
1961 to 1970	Port*	516	500,526
1971 to 1980	Port*	53	87,662
1981 to 1990	Port*	50	48,260
1991 to 2000	Port*	855	810,195
2001 to 2009	Port*	48	46,080
		1,926	1,881,731

Age	Building Type	Quantity	Square Footage
1951 to 1960	Trailer	2	1,464
1991 to 2000	Trailer*	30	15,500
		32	16,964

2010 Grand Totals		
Perm	1,509	12,425,428
Port	1,926	1,881,731
Relo	382	449,367
Trailer	32	16,964
	3,849	14,773,490

2009 Grand Totals		
Perm	1,508	12,418,731
Port	2,008	1,960,501
Relo	352	408,976
Trailer	34	17,972
	3,902	14,806,180

Facility Condition Index 20 Year Projection
with Annual FCI



SCHOOL DISTRICT San Diego Unified School District	FIVE-DIGIT DISTRICT CODE (SEE CALIFORNIA PUBLIC SCHOOL DIRECTORY 40/68338
COUNTY San Diego	CURRENT FISCAL YEAR 2006-2007

The district:

- has not previously submitted a Five Year Plan.
 is submitting this updated/revised Five Year Plan which supersedes the plan currently on file with SAB.

Part I - Authorized District Representative

The following individual has been designated as a district representative by the school board minutes:

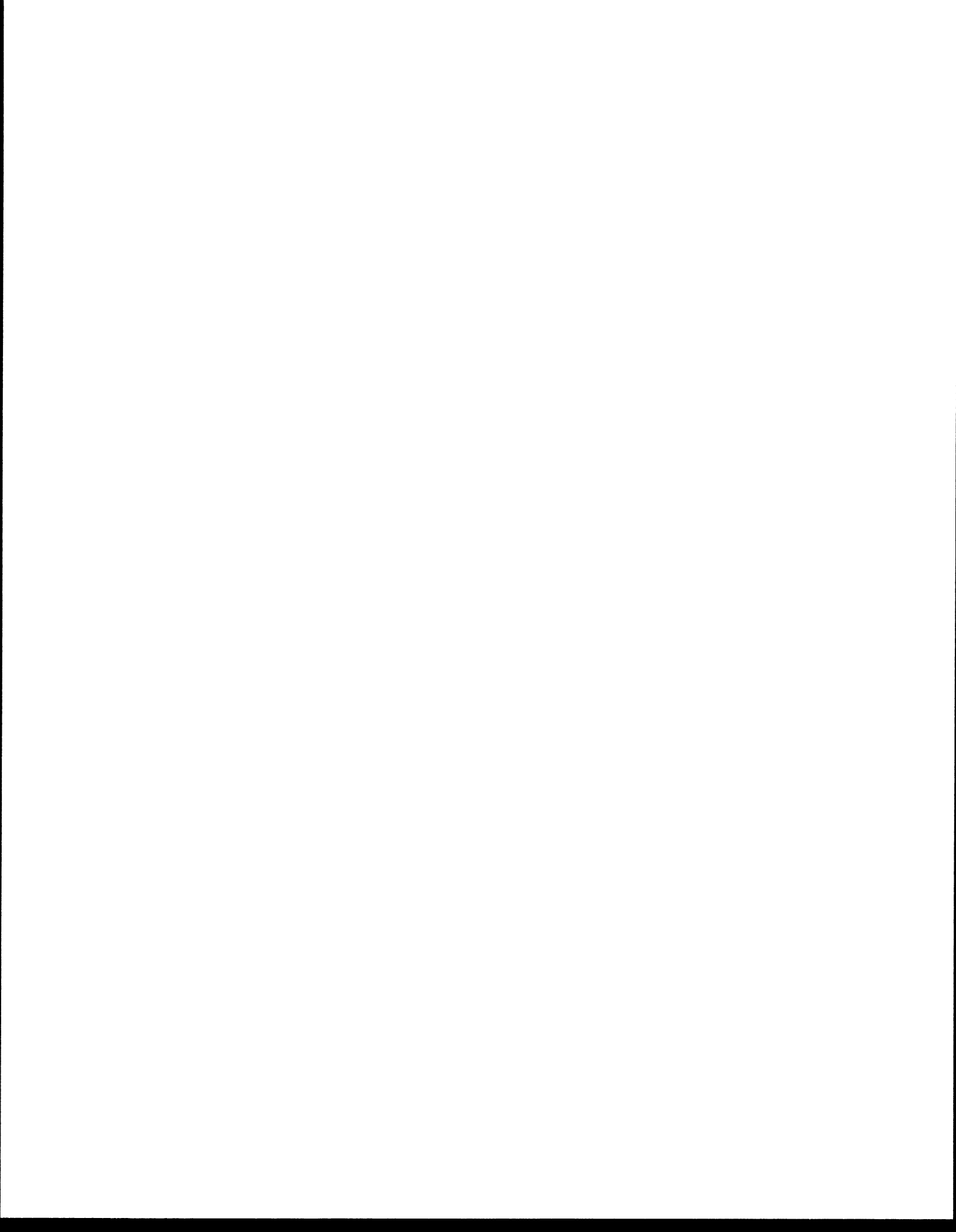
DISTRICT REPRESENTATIVE Tom Wright	TITLE Manager of Physical Plant Operation Support Services
BUSINESS ADDRESS 4860 Ruffner Street San Diego CA 92111	TELEPHONE NUMBER 858-627-7151
E-MAIL ADDRESS twright@sandi.net	FAX NUMBER 858-627-7442

Part II - Estimated Fiscal Year Data

PROJECT CATEGORY	1. NUMBER OF PROJECTS	2. CURRENT FISCAL YEAR	3. SECOND FISCAL YEAR	4. THIRD FISCAL YEAR	5. FOURTH FISCAL YEAR	6. FIFTH FISCAL YEAR	7. TOTAL ESTIMATED COST
Asbestos	87	\$515,000.00	\$435,000.00	\$444,000.00	\$176,000.00	\$135,000.00	\$1,705,000.00
Classroom Lighting	7	\$113,312.25	\$57,279.00	\$194,632.00	\$0.00	\$0.00	\$365,223.25
Electrical	613	\$6,936,907.89	\$7,553,863.68	\$5,500,370.66	\$4,989,115.45	\$2,675,250.93	\$27,655,508.61
Floor Covering	187	\$404,672.18	\$1,209,513.53	\$882,503.00	\$1,784,962.50	\$2,070,987.15	\$6,352,638.36
HVAC	88	\$2,034,580.00	\$1,642,203.10	\$1,523,829.00	\$481,038.00	\$1,978,489.18	\$7,660,139.28
Lead	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Painting	104	\$1,798,557.76	\$1,066,131.80	\$842,547.99	\$3,634,840.46	\$1,861,439.32	\$9,203,517.33
Paving	393	\$3,439,293.21	\$3,370,666.47	\$4,666,575.74	\$1,626,254.01	\$1,801,614.98	\$14,904,404.41
Plumbing	142	\$917,719.06	\$369,747.25	\$1,162,472.47	\$677,695.00	\$100,000.00	\$3,227,633.78
Roofing	67	\$4,177,250.00	\$3,527,131.60	\$1,733,473.51	\$705,600.00	\$2,659,321.02	\$12,802,776.13
Underground Tanks	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Wall Systems	287	\$2,184,989.87	\$2,579,424.86	\$3,233,329.59	\$6,909,200.55	\$5,344,415.07	\$20,251,359.94
8. Grand Total	1975	\$22,522,282.22	\$21,810,961.29	\$20,183,733.96	\$20,984,705.97	\$18,626,517.65	\$104,128,201.09

9. Remarks

This report represents a philosophical change to our typical Five Year State Deferred Maintenance Program (DM) reporting. This presentation depicts approximately twice the annual budget expected for State qualifying deferred maintenance projects. This is not a report of Major Repair and Replacement (MRR) backlog, but instead, a presentation of state qualifying DM (11Million of the 25Million MRR funding) projects and associated costs within the San Diego Unified School District (SDUSD) MRR budget. The \$95.5Million represents 19% to 27% of the need for MRR program funding for the next five years. The inadequate funding of MRR program continues to be a challenge. We look forward to working with you towards a significant reduction in the deference of needed repairs within SDUSD by a properly funded MRR program.



10. List the school names where deferred maintenance projects are planned in this Five Year Plan:

A.L.B.A.	Crown Point	Hage	Linda Vista ES	Pacific Beach ES	Tubman
Adams	Cubberley	Hale/Horizon	Lindbergh/Schweitzer	Pacific Beach Middle	Twain East
Alcott	Curie	Hamilton	Logan	Paradise Hills	Twain Jr/Sr
Angier	Dailard	Hancock	Loma Portal	Parks	Twain Main
Audubon	Dana	Hardy	Longfellow	Peru	University City HS
Baker	Damall	Hawthorne	Los Altos CDC	Perkins	Valencia Park
Balboa	De Anza	Hearst	MacDowell	Perry	Vista Grande
Bandini	De Portola	Henry	Madison	Pershing	Wagenheim
Barnard	Decatur	Hickman	Mann	Point Loma	Walker
Bay Park	Dewey	Holmes	Marshall	Revere	Walker CDC
Bayview Tr	Dingeman	Hoover	Marston	Riley	Wangenheim
Bayview CDC	Doyle	Horton	Marvin	Rolando Park	Washington
Bell	Ed Ctr	IMC	Mason	Roosevelt	Webster
Benchley/Weinberger	Edison	Jackson	McKinley	Ross	Wegeforth
Bethune	Emerson	Jefferson	Mead	Ross CDC	Wegeforth CDC
Bird Rock	Encanto	Jefferson CDC	Mead CDC	Rowan	Whitman
Birney	Ericson	Jerabek	Memorial	Rowan CDC	Whittier
Boone	Euclid	Johnson	Miller	Salomon CDC	Wiggin
Brooklyn	Farb	Jones	Miller CDC	San Diego	Wilson
Brooklyn CDC	Field	Juarez	Mira Mesa	Sandburg	YOU
Cabrillo	Fletcher	Kearny	Miramar Ranch	SCPA	Zamorano
Cadman	Florence	Keiller	Mission Bay	Scripps Ranch	
Carson	Florence CDC	Kennedy CDC	Mission Beach	Sequoia	
Carver	Forward	Kimbrough	MOC	Serra	
Central	Foster	King	Montezuma	Sessions	
Challenger	Franklin	Knox	Montezuma CDC	Silver Gate	
Chavez	Freese	Kroc	Montgomery	Spreckels	
Chesterton	Fremont	Kumeyaay	Morse	Standley	
Chollas	Fulton	La Jolla ES	Muir Alternative	Stevenson	
Clairemont	Gage	La Jolla HS	Muirlands	Sunset View	
Clark	Garfield	Lafayette	NorthPark	Supply Center	
Clay	Gompers	Language Academy	Nye	Tierrasanta	
Cleveland	Grant	Lee	Oak Park	Toler	
Correia	Grantville	Lewis	Ocean Beach	Torrey Pines	
Crawford	Green	Linda Vista Annex	O'Farrell	Transportation	

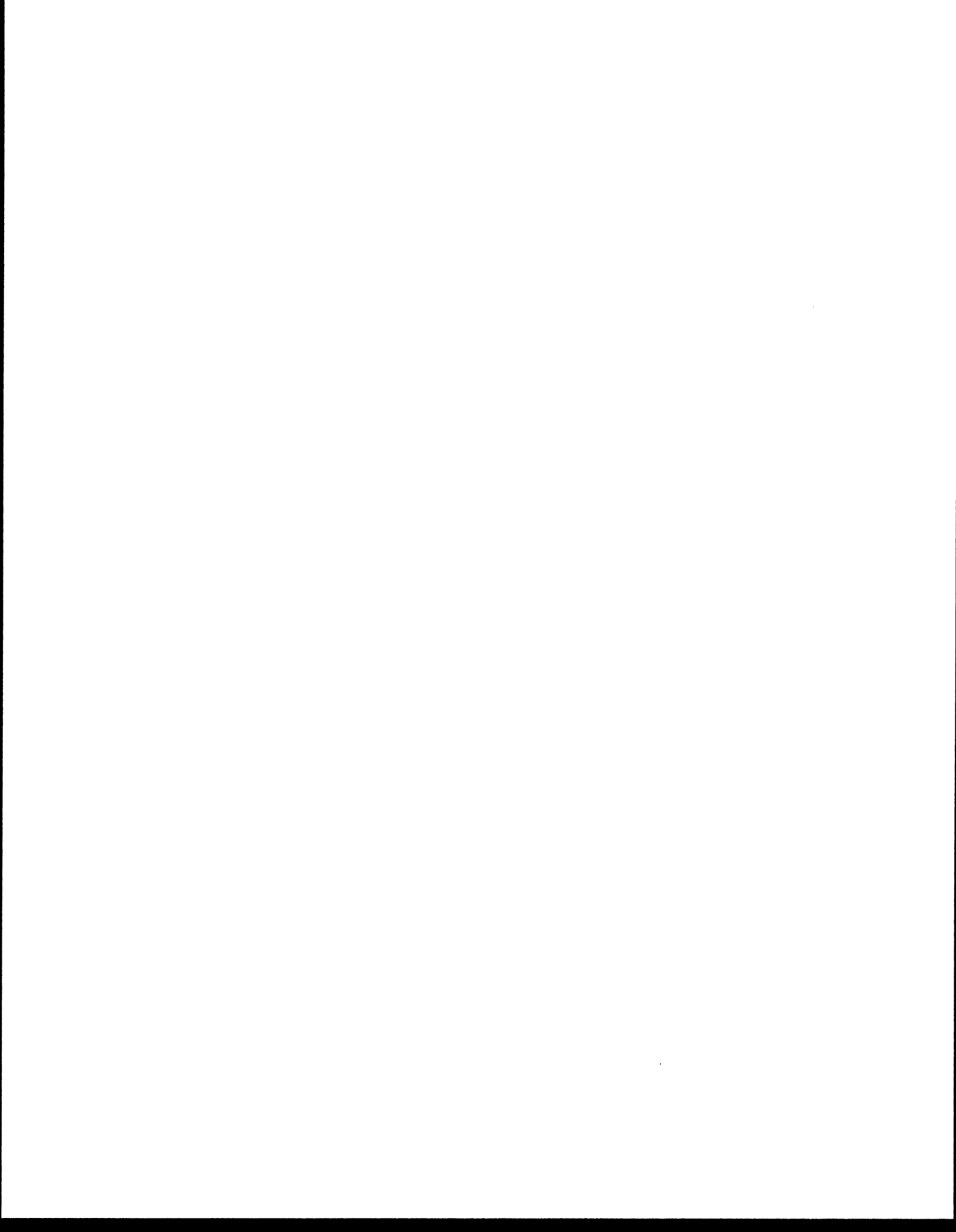
11. **Certifications:**

I certify as District Representative that:

- . this work does not include ineligible items and that all work will be completed in accordance with program requirements, applicable laws and regulations. the district shall maintain proper documentation in the event of an audit; and,
- . the district understands that should an audit reveal that these funds were expended for other than eligible deferred maintenance costs, the SAB will require the district to return all inappropriately expended funds; and,
- . the plans and proposals for expenditures of funds as outlined in this report were discussed in a public hearing at a regularly scheduled and school board meeting on June 26, 2007; and the district has complied with all the other requirements of Education Code Section 17584.1 and 17584.2; and,
- . Beginning with the 2005/2006 fiscal year, the district has complied with Education Code Section 17070.75(e) by establishing a facilities inspection system to ensure that each of its schools is maintained in good repair; and,
- . this Form is an exact duplicate (verbatim) of the form provided by the OPSC. In the event a conflict should exist, then the language in the OPSC form will prevail.

I certify under penalty of perjury under the laws of the State of California that the statements in this application and supporting documents are true and correct.

SIGNATURE OF DISTRICT REPRESENTATIVE	DATE
--------------------------------------	------





June 1st 2010 Board of Education Workshop

PHYSICAL PLANT OPERATIONS

1

AGENDA

- ✘ PPO Overview
 - + Supporting the Educational Environment
- ✘ Focus: Maintenance
 - + Who We Are and What We Do
 - + Maintenance Work Definitions
 - + Maintenance Requirement vs. Available Funding
 - + Types of Funding vs. Operations
- ✘ Focus: Funding
 - + Ensure Funding Matches Operational Requirements
- ✘ Discussion



2

FACILITIES CONTRIBUTION TO EDUCATION

“Researchers have repeatedly found a difference of 5-17 percentile points between achievement of students in poor buildings and students in above-standard buildings, when the socioeconomic status of students is controlled.”

– Glen I. Earthman, “School Facilities Conditions and Student Academic Achievement.” Report prepared for Williams v. State of California, UCLA 2002, pp. 8-9



3

PHYSICAL PLANT OPERATIONS

- × Provides Service to the District:
 - × **Maintenance Planning and Repair Staff**
 - × 14.8 Million square feet of buildings, 2,600 acres
 - × \$37 Million for staff and building repair supplies
 - × Buildings Cleaned by Custodial staff
 - × 14.8 Million square feet of buildings, \$33 Million for 600 staff and cleaning supplies
 - × Grounds Manicured by Landscape staff
 - × 2,600 acres, \$6.8 Million for 106 staff and grounds supplies
 - × Energy Management, Safety Office, Real Estate, PPO Warehouse



4

MAINTENANCE PLANNING AND REPAIR STAFF 09/10

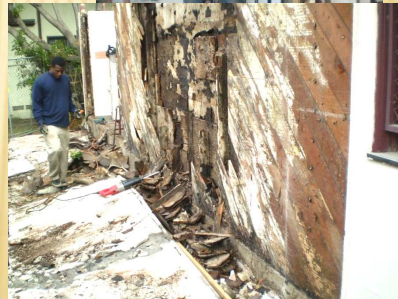
- 14.8 Million Square Feet of Buildings
- 2,600 Acres of District Property
- \$37 Million for Staff and Repair Supplies



5

MAINTENANCE PLANNING AND REPAIR STAFF

- ✗ Zone Configuration
 - + July 2009 – Time to review
- ✗ 83 Job Classifications
- ✗ 347 Positions/306 Filled
- ✗ 209 sites
- ✗ 76,616 Work orders
- ✗ 2,302 Major projects



6

GROUNDS MAINTENANCE

- 2,600 Developed Acres
 - 21 Million Square Feet of Asphalt



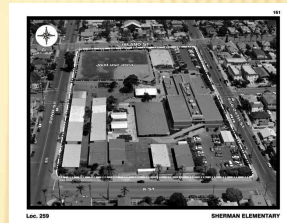
Seal Coat	Asphalt Overlay
Dig and Replace	Trip Hazards
Storm Drains	Fencing
Line Stripe	Sidewalks
Grading	Irrigation Systems



7

BUILDING MAINTENANCE

- ✘ 1509 Permanent Buildings,
12,425,428 Square Feet
Average Age 39 Years
- ✘ 1926 Portable Buildings,
1,881,731 Square Feet
Average Age 48 Years



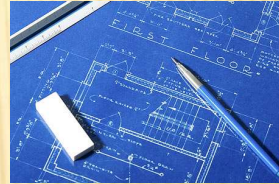
Paint	Audio Visual Systems
Heating and Cooling	Lighting & Power
Fire and Intrusion Alarms	Plumbing Systems
Doors and Locks	Roofing
Time & Signal systems	Pest Control



8

MAINTENANCE PLANNING

- ✘ Maintenance Planning
 - + Support 285 Tradesmen
 - + Coordinate with FPC/Prop S
 - + Maintenance Contracts



Planning	Major Repair and Replacement Plan
Estimating	Repair and Replacement Plan
Inspection	Priority Projects
Work Reception	Capital Improvement
Work Coordination/Scheduling	Preventive Maintenance Planning
Williams/SARC Inspection	Facility Condition Assessment



9

MAINTENANCE WORK TYPES

TERMS

Capital Improvements (CI):

DEFINITIONS

Programmatic upgrades to meet educational needs, district programs and curriculum, and significant change of systems technology (i.e., replacement of heating units with package air conditioning systems, and associated new energy efficient windows and building insulation, etc.).

Major Repair & Replacement (MRR):

Replacements and upgrades of systems, such as new roof system, building enclosures, etc. Often considered a part of modernization or renovation of a building, generally with a life expectancy of 20 or more years.

Repair & Replacement (RR):

Repair and/or replacement of items generally with a life expectancy of less than 20 years.

Regular Maintenance (RM):

Minor repairs, as reported from sites, resulting from normal wear and tear on buildings such as toilets, locks, light switches, etc.

Preventive Maintenance (PM):

Maintenance such as inspections and lubrications of systems designed to prevent deterioration into disrepair.



10

CAPITAL WORK

TERMS

Capital Improvements (CI):

DEFINITIONS

Programmatic upgrades to meet educational needs, district programs and curriculum, and significant change of systems technology (i.e., replacement of heating units with package air conditioning systems, and associated new energy efficient windows and building insulation, etc.).

Major Repair & Replacement (MRR):

Replacements and upgrades of systems, such as new roof system, building enclosures, etc. Often considered a part of modernization or renovation of a building, generally with a life expectancy of 20 or more years.



MAINTENANCE WORK

TERMS

Repair & Replacement (RR):

DEFINITIONS

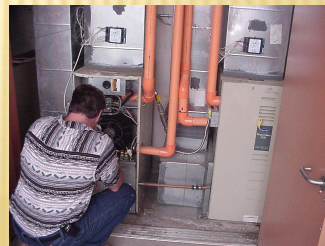
Repair and/or replacement of items generally with a life expectancy of less than 20 years.

Regular Maintenance (RM):

Minor repairs, as reported from sites, resulting from normal wear and tear on buildings such as toilets, locks, light switches, etc.

Preventive Maintenance (PM):

Maintenance such as inspections and lubrications of systems designed to prevent deterioration into disrepair.



SCHOOL FACILITY METRICS

- × Comparative Industry Funding Metrics
 - + 2% – 4% of Current Replacement Value (CRV)
 - × SDUSD CRV \$4.1B or \$80M to \$160M Annually
 - + Portolan Metrics
 - × \$4 – \$5 Per Square Foot: \$59.2M to \$74M
 - × \$400 – \$500 per Student or \$52.8M to \$66M
 - + State 3% General Fund Contribution to Routine Restricted Maintenance Account \$34M



13

DISTRICT FACILITY CONDITION

WHY MAINTENANCE COUNTS

- × As good stewards of district assets, a measure of district condition is appropriate
- × The State's Williams settlement requires visual inspections be conducted and minor repairs performed
- × A more accurate indicator requested by the Independent Citizen's Oversight Committee is the Facility Condition Index

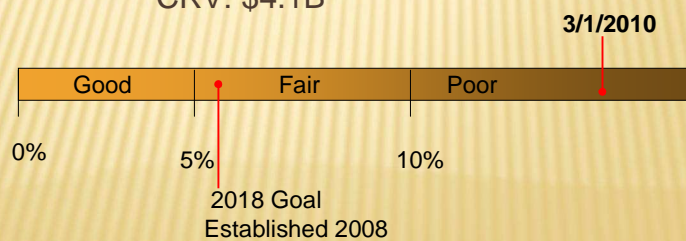


14

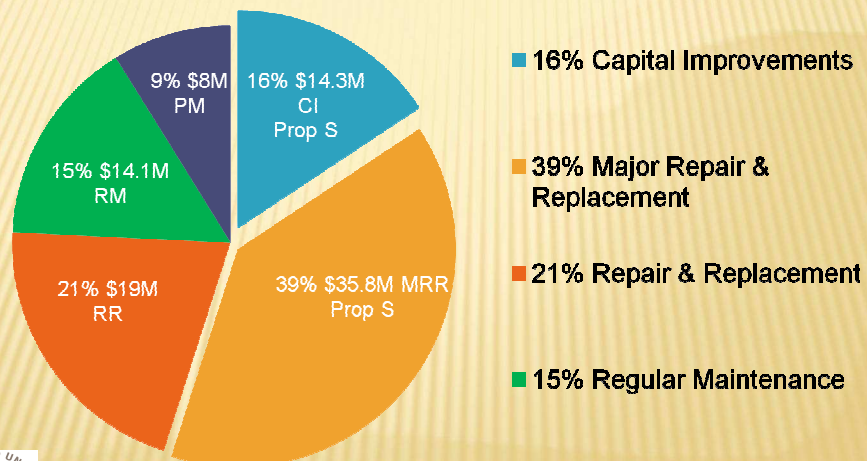
DISTRICT FACILITY CONDITION CONT.

- ✘ To calculate the Facility Condition there is a industry standard of a ratio of total cost of repairs needed, divided by the current replacement value (CRV) of the district.
- ✘ Here is the current district calculation:

$$\frac{\text{Needed Repairs: } \$704.7\text{M}}{\text{CRV: } \$4.1\text{B}} = 17.19\%$$



TEN YEAR MAINTENANCE PLAN PRESENTED 2008 (ANNUALLY)

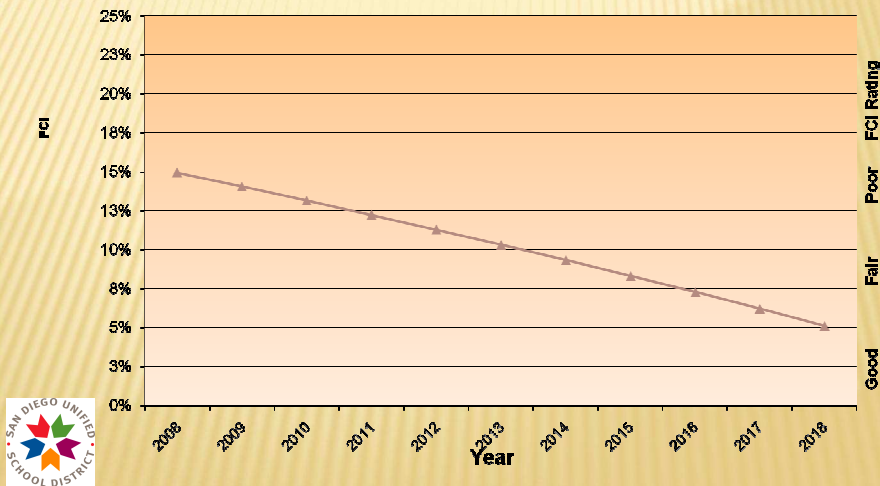


**2008 Maintenance Plan
Total \$91.2 Million a year**

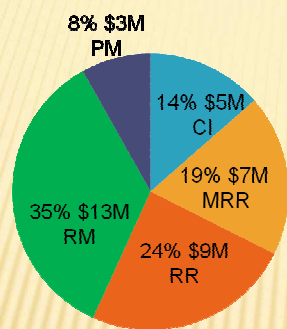
DISTRICT FACILITY CONDITION

JULY 2008 PLAN

Facility Condition Index July 2008, 10 Year Plan



09-10 MAINTENANCE IMPLEMENTATION

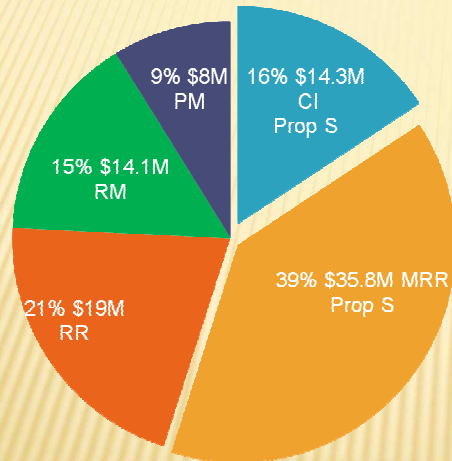


- 14% Capital Improvements
- 19% Major Repair & Replacement
- 24% Repair & Replacement
- 35% Regular Maintenance
- 8% Preventive Maintenance

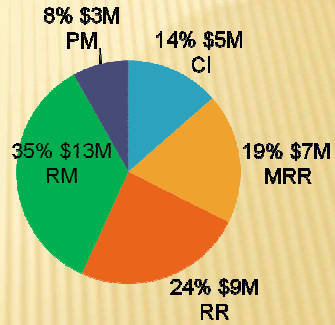
2009/10 Maintenance Expenditures
Total \$37 Million



2008 Plan v. 2010 Execution



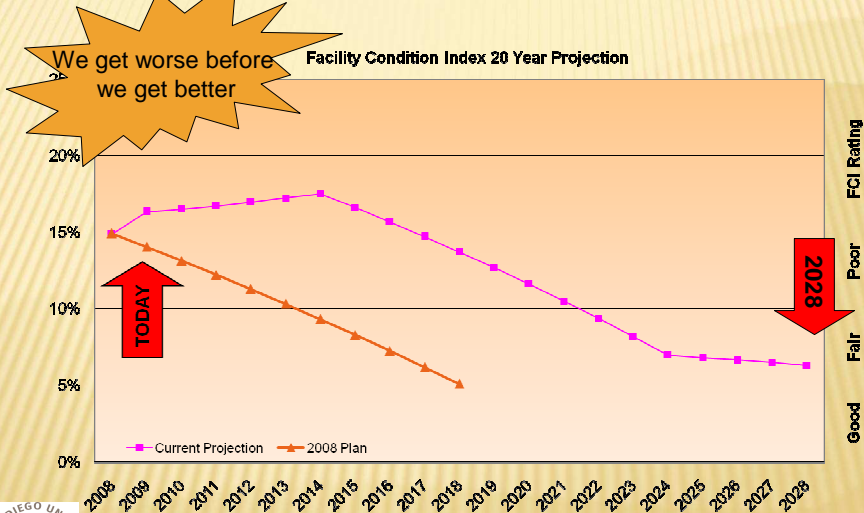
**2008 Maintenance Plan
Total \$91.2 Million a year**



**2009/10 Maintenance Expenditures
Total \$37 Million**



DISTRICT FACILITY CONDITION: CURRENT



THE CHALLENGE: FUNDING

- × Near Term Funding of Physical Plant Operations (PPO)
 - + 2009/10 General Fund Contribution
 - + 2010/11 General Fund Contribution

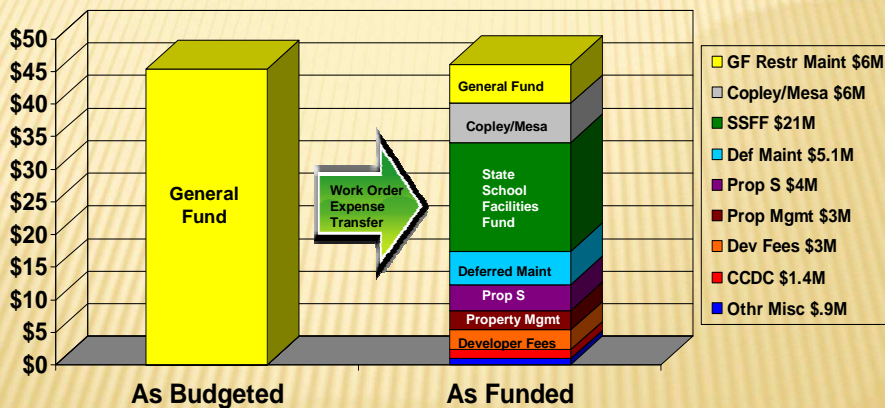
- × Long Term Funding of PPO
 - + Budget Flexibility Ends 2013
 - × Resume 3% General Fund Contribution to Routine Restricted Maintenance Account (RRMA)
 - × Approximately **\$34M**
 - × State School Facilities Fund Depleted

Contractual Pay Increases Begin



PPO BUDGET & EXPENSE TRANSFER PLAN

FISCAL YEAR 2010/11



MAINTENANCE WORK TYPES

APPROPRIATE FUNDING FOR WORK

Capital Funds for Capital Projects:

Capital Improvements (CI):
Major Repair & Replacement (MRR):
Repair & Replacement (RR):

Deferred Maintenance Fund
 Proposition S Bond Fund
 Redevelopment Fund
 State School Facilities Fund
 Developer Fee Fund
 Property Management Fund

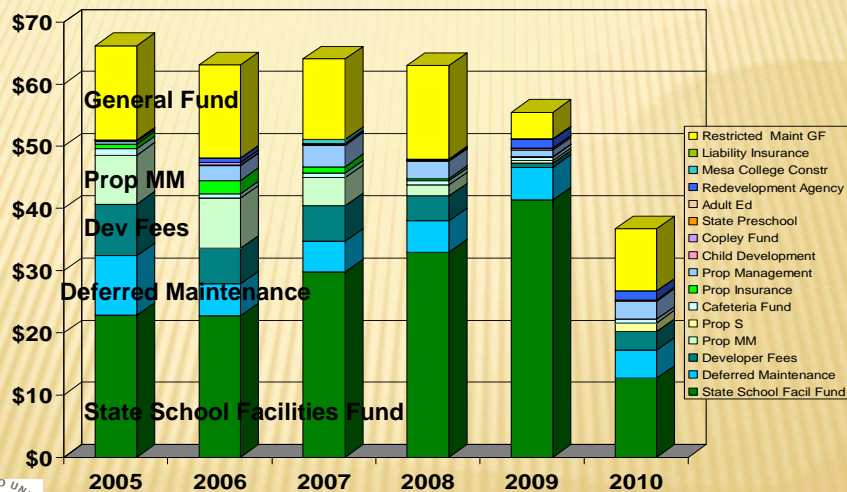
Routine Restricted Maintenance Account:

Regular Maintenance (RM):
Preventive Maintenance (PM):
Repair & Replacement (RR):

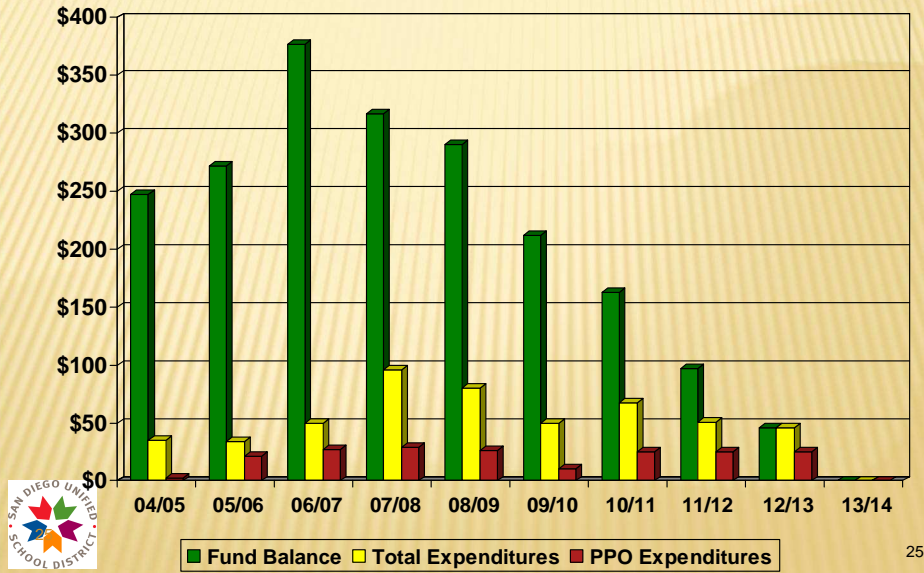
+ **General Funds**



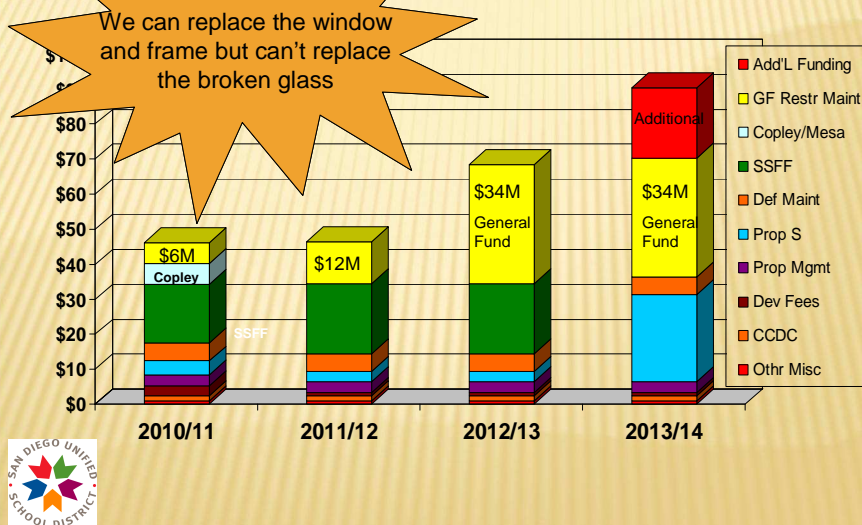
PPO Maintenance Funding History



STATE SCHOOL FACILITIES FUND



PPO BUDGET PROJECTIONS FISCAL YEARS 2011 - 2014



MAINTENANCE FUNDING ISSUES

- × **Insufficient Funding for Regular & Preventive Maintenance in General Fund**
- × Prop S Contribution to MRR Has Been Delayed until FY 13/14
- × In FY 12/13 SSFF Funds Depleted **(-\$20M)**
- × Other Funds Also Being Depleted **+ (-\$5M to \$10M)**



27

FACILITIES CONTRIBUTION TO EDUCATION

“Researchers have repeatedly found a difference of 5-17 percentile points between achievement of students in poor buildings and students in above-standard buildings, when the socioeconomic status of students is controlled.”

– Glen I. Earthman, “School Facilities Conditions and Student Academic Achievement.” Report prepared for Williams v. State of California, UCLA 2002, pp. 8-9



28

RECOMMENDATIONS:

Support the 2010/2011 Maintenance Budget as Presented

Support Review of PPO Zone Structure

Begin Transition for Funding Routine Restricted Maintenance Account at 3% of the General Fund

Support 2013 Maintenance Funding at 3% of the General Fund for the Routine Restricted Maintenance Account, \$34M

Fund Annual Maintenance Plan per 2008 Recommendations, \$92M



Facility Inspection Tool (FIT) Form

PART II: EVALUATION DETAIL

Date of Inspection: _____

School Name: _____

Category	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
Area	GAS LEAKS	MECH/HVAC	SEWER	INTERIOR SURFACES	OVERALL CLEANLINESS	PEST/VERMIN INFESTATION	ELECTRICAL	RESTROOM	SINKS/ FOUNTAINS	FIRE SAFETY	HAZARDOUS MATERIALS	STRUCTURAL DAMAGE	ROOFS	PLAYGROUND/ SCHOOL GROUNDS	WINDOWS/ DOORS/ GATES/FENCES	
	COMMENTS															
	COMMENTS															
	COMMENTS															
	COMMENTS															
	COMMENTS															
	COMMENTS															
	COMMENTS															

Marks: **√** = Good Repair (when filling up the electronic version, please use **ctrl+G**); **D** = Deficiency; **X** = Extreme Deficiency; **NA** = Not applicable

Use additional sheets as necessary.

SUPPLEMENTARY WORK SHEET

MRR/RR Report
June 25, 2010



SITE NAME: _____
 SITE NUMBER: _____
 INSPECTOR'S NAME: _____
 DATE: _____

Program	GOOD	FAIR	POOR	ESTIMATED SCHEDULED DATE	FOLLOW UP REQUIRED	ASSIGNED PEI
ASPHALT					YES / NO	FILTER
BLEACHERS					YES / NO	NICHOLS
CONCRETE					YES / NO	FILTER
DG FIELD GRADING					YES / NO	FILTER
DOOR SYSTEMS					YES / NO	F. JONES
ELEVATORS AND LIFTS					YES / NO	STRONG
EMCS					YES / NO	TACASON
FENCING					YES / NO	FILTER
FIRE ALARM					YES / NO	CONN
FLOORING/CARPET/VCT					YES / NO	F. JONES
GREASE TRAPS					YES / NO	K. JONES
GYM FLOORS					YES / NO	F. JONES
HEAT MITIGATION/WINDOW FILM/CEILING FANS/COOLING					YES / NO	TACASON
I21 BRACKETS						MARKER
I21 CABINET						F. JONES
I21 IWB						CONN
I21 OVERALL PROGRAM						MARTIN
IRRIGATION					YES / NO	FILTER
KITCHEN ELECT/EMCS/METERING UPGRADE					YES / NO	CONN

SUPPLEMENTARY WORK SHEET

MRR/RR Report
June 25, 2010



SITE NAME: _____
 SITE NUMBER: _____
 INSPECTOR'S NAME: _____
 DATE: _____

Program	GOOD	FAIR	POOR	ESTIMATED SCHEDULED DATE	FOLLOW UP REQUIRED	ASSIGNED PEI
LANDSCAPE					YES / NO	FILTER
LIGHTING/EMCS/EXTERIOR INCL. SECURITY					YES / NO	STRONG
LOCKERS					YES / NO	TACASON
MAJOR ELECT INFRASTRUCTURE					YES / NO	STRONG
MARQUEES					YES / NO	STRONG
MASTER CLOCKS					YES / NO	CONN
MECHANICAL					YES / NO	TACASON
PAINT					YES / NO	NICHOLS
PLAYGROUND					YES / NO	FILTER
PROJECTION SCREENS					YES / NO	MARKER
RAMPS & RAILS					YES / NO	MARKER
RESTROOM UPGRADE/PARTITIONS/TERRAZZO/WATERLESS URINALS/FIXTURES/VENTILATION					YES / NO	K. JONES
ROOF					YES / NO	F. JONES
SECURITY (LIGHTING & PHYSICAL)					YES / NO	CONN
SEWER LINES					YES / NO	K. JONES
STAGE LIGHTING					YES / NO	CONN
STORM DRAINS					YES / NO	K. JONES
WINDOWS					YES / NO	MARKER