

ADMINISTRATIVE PROCEDURE

SAN DIEGO UNIFIED SCHOOL DISTRICT

NO: 5205

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CATEGORY: **Support Services, Maintenance**

EFFECTIVE: **1-29-62**

SUBJECT: **Request for Maintenance Service**

REVISED: **10-18-99**

A. PURPOSE AND SCOPE

1. To outline administrative procedures governing certain types of maintenance services required on buildings, grounds, and equipment.

B. LEGAL AND POLICY BASIS

1. **Reference:** Board policy: G-2000, G-3000, I-1350.

C. GENERAL

1. **Originating Office.** Suggestions or questions concerning this procedure should be directed to the Maintenance, Operations, Warehousing, and Distribution Department; Business Services Administration; Business Services Division; Administrative/Operational Support.
2. **Definitions**
 - a. **“Request for Maintenance Service”:** Form (E.1.) used by principals and department heads to obtain improvements, new facilities, or any type of maintenance work not funded from the district maintenance budget.
 - b. **Maintenance repair:** Work required to restore existing facilities and equipment to approximately their original condition as far as practicable.
 - c. **Capital outlay:** Acquisition of fixed assets, or addition to such assets, including land, improvement of grounds, buildings, and equipment, provided such expenditures clearly increase the value of physical properties of the district.
 - d. **Estimates:** Calculations of projected costs for service, derived from scope of work defined by originator. Approved and funded requests for service are charged actual costs for work performed.
3. **ASB Requests.** Requests for service from associated student bodies must be approved by the principal. Student councils must approve the expenditure in their adopted budget or minutes. Copies of the adopted budget, ASB minutes, or donation statement must be submitted with the “Request for Maintenance Service” form (E.1.) as an attachment.
4. **PTA Requests.** Requests for service from the PTA must be approved by the principal.
5. **Donated Services.** Schools receiving donated services are required to forward a completed “Request for Maintenance Service” form (E.1.) to the Maintenance,

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Operations, Warehousing, and Distribution Department in accordance with Procedure 9302.

D. IMPLEMENTATION

1. Processing of Request for Maintenance Service.

a. **Principal/manager** completes Blocks 1–3 of “Request for Maintenance Service” form (E.1.).

(1) Provides detailed description of work requested in Block 2.

Note: If originator desires an outside contractor to be considered for estimating or accomplishing request, indicates so in Block 2. If originator desires a specific contractor, also notes contractor’s name in Block 2. Maintenance, Operations, Warehousing, and Distribution Department will provide necessary information (e.g., scope, district regulations) for developing in-house and/or contractor estimates.

(2) Provides reason for request in Block 3. Reason should provide enough detail to make clear either problem that is to be solved by requested work or need/desire for requested work.

(3) Signs in Block 1 to indicate his/her approval of request and forwards to the Maintenance, Operations, Warehousing, and Distribution Department for estimating.

(4) **Optional pre-authorization of work.** After completing Blocks 1–3, pre-authorizes work—if expedited processing of Request for Maintenance Service is desired—by indicating maximum amount in optional block, entering budget number in Block 5, and approving in principal/manager space in Block 6; forwards service request to the Budget Department, Finance Division, Administrative/Operational Support, for approval of funding. After Budget Department approval, request is forwarded to the Maintenance, Operations, Warehousing, and Distribution Department for implementation of work. **Note:** If estimate exceeds pre-authorized amount, requesting site will be contacted by the Maintenance, Operations, Warehousing, and Distribution Department.

b. **Maintenance, Operations, Warehousing, and Distribution Department**

(1) Determines whether request should be site-funded (e.g., capital outlay, externally funded projects) or funded from maintenance budget.

- (2) If request is to be site-funded, prepares an estimate and forwards original document with estimated cost to principal or manager originating request.
 - (3) If request is appropriate to be funded from district maintenance budget, cancels request for service and issues a work order based on availability of funds and on established district policies and standards; *if disapproved, cancels request, indicates reason, and returns copy of request to originator.*
- c. **Principal/manager** reviews request for priority and cost estimate.
- (1) If approved, enters budget number (Block 5), signs approval of estimate (Block 6), and forwards to the Budget Department for approval of budget account. (Principal/manager is responsible for obtaining approval for requests requiring division and/or other central office approval.)

Note: ASB and PTA requests for maintenance service must be accompanied by a check made out to San Diego Unified School District for amount of job estimate. Requests funded by associated student bodies are to be sent to the ASB auditor, Internal Audit Department, and must have ASB minutes, ASB budget reference or donation statement, and check attached to “Request for Maintenance Service.” PTA-funded requests must be approved by principal and then forwarded to the Budget Department for approval with a check for estimated amount of job.
 - (2) *If disapproved, marks “cancel” on face of request, indicates reason for cancellation, and forwards original (yellow copy) to the Maintenance, Operations, Warehousing, and Distribution Department.*
- d. **Budget Department** approves or disapproves budget account; if approved, forwards “Request for Maintenance Service” to the Maintenance, Operations, Warehousing, and Distribution Department.
- e. **Maintenance, Operations, Warehousing, and Distribution Department** initiates work on all approved requests for service and contacts originator and/or funding office if questions arise regarding approval, funding, work to be accomplished, and/or scheduling of approved work.

E. FORM AND AUXILIARY REFERENCES

1. Request for Maintenance Service, Stock Item 22-R-3250.

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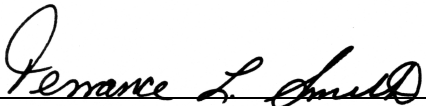
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F. REPORTS AND RECORDS

G. APPROVED BY



Chief of Staff, Terrance L. Smith
For the Superintendent of Public Education