The primary role of the District’s Facilities Department is to support the students and staff by providing an enabling, safe, and operationally functional educational environment while protecting the community's investment in facilities and equipment.

These responsibilities fall within three primary areas; **Custodial, Maintenance** and **Capital Improvements** integrated into a single organizational management structure. The organization is typically responsible for operating and for maintaining the built environment.

The following section will discuss the industry’s standard terminology and definitions for these primary areas. Also included are general summaries regarding the District’s current management of these primary areas. The focus of this long-term plan is mostly related to Capital Improvements. However, additional review and evaluation of the other areas is just as significant.

1. **Custodial** - Work activities performed on a recurring basis throughout the year which intends to meet routine, daily operational needs including the work of custodians, grounds workers, and general maintenance crews who do the daily work of cleaning and routine maintenance.
   
   a. **General Definition & Terminology**
i. Operational Maintenance – Activities related to the normal performance for which an asset or item of equipment is intended to be used. In addition to these daily, routine tasks, operational maintenance includes responding to calls for emergency repairs, patching holes, replacing light bulbs and repairing furniture and fixtures.

ii. Custodial Maintenance – Activities associated with general day-to-day care and cleaning operations necessary to operate a constructed asset, installation, or program to include housekeeping duties such as restroom cleaning and sanitization, floor waxing, vacuuming and window cleaning; and rodent and pest control, and trash removal. They also perform a variety of non-cleaning tasks such as opening the school, checking for vandalism, identifying safety and maintenance needs, inspecting playgrounds and fields, responding to teachers’ and principals’ requests, setting up for special activities and events, ordering and delivering supplies, and putting up the flag and PE equipment.


b. Current System

i. Staffing – All custodians are funded from the general fund by school. The allocations for custodians are based on a formula taking into account the size and enrollment of the facility when custodial services are provided by District employees. In some cases an external provider is being used for custodial services.

Ground maintenance is funded from the general fund by school. All ground maintenance is currently provided by external vendors.

ii. Management & Services – All custodians are assigned to the facility operator (principal). There is little to no centralized oversight establishing expectations, production rates, and verifying quality of services. The site based custodians provide the essential custodial function as described above.
Ground maintenance providers report to the building operator. There is little to no centralized oversight establishing expectations, production rates, and verifying quality of services.

c. Proposed Actions

i. Study allocation formula and industry standards to ensure proper staffing has been established.
ii. Evaluate standards and metrics used to validate employee or vendor performance.
iii. Evaluate creating a centralized grounds crew to provide all lawn care needs.
iv. Evaluate activities performed on the exterior façade as it relates to custodial maintenance.
v. Establish District standards for all custodial and grounds maintenance.
vi. Create District positions providing support and assistance to all facility locations for custodial maintenance.

II. Maintenance - To repair unscheduled and scheduled deficiencies during the time period in which they occur. This includes preventive maintenance for buildings, structures, and installed building equipment (IBE) as recommended by manufacturers and industry standards.

a. General Definition & Terminology

i. **Emergency Maintenance** – Maintenance activities that are unscheduled repair, to include call outs, to correct an emergency need to prevent injury, loss of property, or return asset to service. These repairs are initiated within a very short time period from which the need is identified, usually within hours.

ii. **Corrective Maintenance** – Unscheduled maintenance repairs performed to identify, isolate, and rectify a fault so that the failed equipment, machine, or system can be restored to an operational condition within the tolerances or limits established for in-service operations.

iii. **Preventive Maintenance** or planned maintenance – Scheduled servicing, repairs, inspections, adjustments, and replacement of
parts that result in fewer breakdowns and fewer premature 
replacements and achieve the expected life of constructed assets. 
Condition-based maintenance is another form of preventive 
maintenance that is performed after one or more indicators show 
that equipment is going to fail or that equipment performance is 
deteriorating.

iv. Predictive Maintenance - Techniques help determine the 
condition of in-service equipment in order to predict when 
maintenance should be performed. This approach offers cost 
savings over routine or preventive maintenance, because tasks are 
performed only when warranted. The main value of Predicted 
Maintenance is to allow convenient scheduling of corrective 
maintenance, and to prevent unexpected equipment failures.

b. Current System

i. Staffing – All maintenance staff are funded from the general fund. 
The maintenance department consists of 81 employees in the 
following trades or professional positions:
  1. Management – 6
  2. Energy – 3
  3. HVAC – 13
  4. Electrical – 9
  5. Plumbing – 6
  6. Carpenters – 13
  7. PM (Misc. Trades) – 15
  8. Painting – 4
  9. Roofing – 3
 10. Fire Alarm – 2
 11. Grounds – 3
 12. Pest Control – 2
 13. Locksmith – 2

All maintenance staff are based from a central location in Conway, 
SC. Staffing allocations are based upon historical needs to perform 
the services provided by the maintenance department.

ii. Management & Services - The maintenance department provides 
emergency repair, work order response, utility/systems
management, limited preventative maintenance and relocatable classroom management. The responsibility for sustainment projects has been shared between maintenance and capital improvements in the past.

c. Proposed Actions

i. Study allocation formula and industry standards to ensure proper staffing has been established. Focus staffing on providing all service in-house.

ii. Evaluate standards and metrics used to validate employee performance.

iii. Evaluate creating a centralized grounds crew to provide all lawn care needs and exterior façade as it relates to custodial maintenance.

iv. Establish District standards, policies, and procedures for all maintenance related activities.

v. Focus on “customer service” by improving communication and response times related to work orders or emergency repairs.

vi. Review and standardize preventative and recurring maintenance against established national standards such as RSMeans Facilities Maintenance and Repair.

vii. Focus processes related to predictive and preventative maintenance.

viii. Evaluate and implement an enterprise software solution for all facility areas.
III. Capital Improvement – Is the construction, installation, or assembly of a new asset, or the alteration, expansion, or extension of an existing asset to accommodate a change of function or unmet programmatic needs. This may include major renovation of an entire existing asset in order to properly restore and/or extend the life of the asset without a change of function. This includes constructed asset deficiencies where there is non-compliance to codes (e.g. life safety, ADA, OSHA, environmental, etc.) and other regulatory compliance requirements. This includes engineering and/or contracted A&E services that support planning, design, and execution of deferred maintenance activities.

a. General Definition & Terminology

i. **New Construction** – The erection, installation, or assembly of a new asset.

ii. **Renovations (for change of function, without expansion)** – Work to change the function of and existing facility or any of its components. The capacity or size of the facility is not expanded. Deferred maintenance of the original facility may be reduced or eliminated by an alteration.

iii. **Additions** – Increasing the capacity or size of a facility to serve needs different from, or significantly greater than, those originally intended. Expansion is considered a capital improvement activity because it is creating a new (i.e. expanded) asset. Deferred maintenance needs on the original facility may be reduced or eliminated through an expansion.
iv. **Sustainment** - Also includes major repairs or replacement of facility components that are expected to occur periodically throughout the life cycle of facilities. This work includes regular roof replacement, refinishing of wall surfaces, repairing and replacement of heating and cooling systems, replacing tile and carpeting and similar types of work.

v. **Inspections/Assessments/Surveys** - Regularly scheduled reviews consisting of observations and/or measurements needed to determine the physical and functional condition of an asset, to identify any changes from initial or previously recorded conditions, and to ensure that the asset continues to satisfy present service requirements.

vi. **Design Management** – Encompasses the ongoing processes, business decisions, and strategies that enable innovation and create effectively-designed facilities, services, communications, environments, and brands that enhance our quality of life and provide organizational success.

b. Current System

i. **Staffing** - All construction management staff are funded from capital funding, not the general fund. The size of the department has fluctuated over the years based upon building programs and work load. The construction management department consists of eight (8) employees in the professional positions:
   1. Director – 1
   2. Planning – 1
   3. Project Managers – 3
   4. Asst. Project Manager – 1
   5. Program Specialist – 1
   6. Construction Specialist – 1

ii. **Management & Services** - The construction management department manages all capital improvement projects as identified above from inception to completion. The department manages design professionals, code enforcers (OSF), special inspectors, contractors, vendors and suppliers.
The department coordinates with other District departments including Learning services, Finance, Food Service, Transportation, and Procurement.

The department provides student enrollment forecasting as demonstrated in the Enrollment & Capacity section of this plan.

c. Proposed Actions

i. As indicated above, the main focus of the long-term plan is addressing facility conditions, capacity concerns, and adequacy. Based upon this focus, the proposed management plan is much more detailed than indicated in the Operations or Maintenance sections above.

ii. Implement proposed delivery methods for capital improvement projects as outlined and aligned with Board Governance:

Long-term Plan Proposed Project Delivery & Contacting Methodology

Design-Bid-Build (New Construction)

Advantages: Familiar delivery method. Simple process for all involved. Fully defined project scope for both design and construction. Both design team and contractor accountable to the District. Typically results in most competitive initial price.
Disadvantages:
- Linear process with longer schedule duration than other methods.
- Re-design may be required if project is bid over budget.
- Quality of contractors and subcontractors is questionable.
- Adversarial relationship between all parties – NO TEAM.
- No input from contractor during design.
- Design issues = contractor change orders.

**Construction Manager at Risk (Additions & Renovations)**

Advantages:
- Selection of contractor based upon qualifications, experience and const. team.
- Contractor provides design phase assistance in budget and planning.
- District can ensure quality of subcontractors.
- Both design team and contractor accountable to the District.
- Faster delivery schedule than traditional Design-Bid-Build.
- Promotes teamwork between all parties.
- Theoretically, reduces potential contractor claims.

Disadvantages:
- Longer schedule duration than Design-Build method.
- Unable to verify if project is at the most competitive price.

**Design-Build** (Renovations – no Additions)

Advantages:
- Faster delivery schedule than traditional Design-Bid-Build and CM @ Risk.
- Single point of responsibility for design and construction.
- Selection of DB firm based upon qualifications, experience and DB team.
Contractor provides design phase assistance in budget and planning. Project cost determined at planning stage. Theoretically, no potential DB firm claims (errors and omissions).

Disadvantages: No check and balance between architect and contractor. Additional oversight by District to ensure scope and quality. Increased speed and fewer reviews increase potential for mistakes. Unable to verify if project is at the most competitive price.

**Indefinite Delivery** (Sustainment Projects) – Follow local procurement guidelines.

iii. Separate design and construction management for capital projects.

iv. Increase staffing for capital improvement projects to align with plan and work load. The increases have been determined based upon the contracting and delivery methodology indicated above.

Additional staffing will be added as needed for the functioning of the department. All added staff will be considered permanent as related to the long-term plan – over the next ten years.

If additional temporary staff is needed due to increased project loading, then these positions will be sourced from a project management firm as “extension of staff”.

v. Establish District standards, policies, and procedures for design and construction of all capital improvement projects.

vi. Focus on “customer services” for all levels of customers – board members, internal, community, public, media, etc. by improving communication and setting expectations related to capital improvement projects.
vii. Evaluate and implement an enterprise software solution for all facility areas.

In conclusion, in order to effectively manage cost while maximizing the useful life of building systems, all three areas **Custodial, Maintenance** and **Capital Improvements** must be integrated into a single organizational management structure. The resources necessary to meet these responsibilities need to be analyzed resulting in a recommended best operating organization as indicated above in proposed actions. This can be done by establishing levels of service for custodial and janitorial services and benchmarked against similar organizational structures to establish proper staffing. This would establish the preventative and predictive maintenance components, task and frequency effectiveness while substantiating required maintenance resources. Incorporate an enterprise software solution (CMMS) which enables, direct customer needs/feedback, maintenance effectiveness, project management and the ability to proactively forecast facility needs.