

Administrative Procedures

AP-901 FACILITIES PLANNING, OPERATIONS AND MAINTENANCE	Date of implementation: January 2015
	Date of update: December 7, 2022 Related Administrative Procedures:

Purpose: To clearly outline the areas of Facilities planning and provide an overview of essential services and supporting processes.

In accordance with *The Education Act, 1995*, the Board shall allocate adequate funding to maintain all Division owned buildings and site assets. This includes grounds, buildings, and equipment. Assets will be maintained in a manner that maximizes the life through the development and adherence to a maintenance program, which includes preventative, predictive and general maintenance, repairs, and capital maintenance. All activities will adhere to industry standards, codes, and Occupational Health and Safety regulations.

Facilities Planning:

- Major and minor capital projects are long-term priority projects identified in a multi-year Facilities Master Plan, which is reviewed annually approved by the Board and submitted to the Ministry of Education prioritizing the top three (3) major projects and top two (2) minor projects. The Plan is reviewed by the Ministry of Education and individual projects approved are funded by them. Minor capital projects are between \$1-10 million, and major capital projects are more than \$10 million.
- Preventative Maintenance and Renewal (PMR) projects are projects with a medium-term priority and generally valued below \$1 million and are prioritized in a three-year (3-year) PMR Plan that is updated annually, approved by the Board and submitted to the Ministry of Education. These projects are funded through the annual funding allocation from the Ministry.
- Minor renovation projects are short-term renovations with a more immediate need and duration, which are funded annually within the overall Division budget. These projects are generally less than \$100,000 and are prioritized annually by the Facilities Manager, in consultation with Facilities and school staff.
- Maintenance requests are submitted using the service request module of Asset Planner. Requests are prioritized considering the impact on the health and safety of students and staff. The main categories prioritized include roofing, building structure and integrity, heating and ventilation, electrical, plumbing, building security and emergencies.

Procedures:

1) Features of the Plans

- a) The Director or designate is responsible for ensuring the currency of facilities capital plans.
- b) The plans will be developed and maintained by the Deputy Director of Division Services and Facilities Manager, in consultation with the Director.
- c) Educational specifications for new buildings or those undergoing remodeling are developed in consultation with school-based administrators, staff members and school community councils as well as any other individuals or groups qualified to provide expertise and advice.

2) Major and Minor Capital Planning

Capital projects include facility expansions (new schools and major additions), as well as modernization and renovations. Projects are evaluated based on the Ministry of Education's criteria:

- a) Health and safety – potential impact on health and safety of occupants if the project is not completed (e.g., replacement or essential modernization to correct unsafe conditions or prevent a major building failure).
- b) Facilities condition – facility audit reports.
- c) Utilization rates – utilization of existing facilities.
- d) Enrolment projections – trends and subsequent school board plans for the accommodation of students.
- e) Education program delivery – importance of the project to achieving program delivery.
- f) Additional information (e.g., studies, regional plans).

After internal prioritization of the top three major projects and top two minor projects, the annual Capital application is reviewed and approved by the Board and submitted to the Ministry of Education.

3) Preventative Maintenance and Renewal (PMR) Planning

PMR projects may include projects that:

- a) Prolong the useful life of the facility through planned, proactive replacement of major components that have exceeded their life cycle and are likely to fail in the near future or have failed.
- b) Upgrade education areas to meet program or operational requirements.
- c) Meet the needs of students requiring intensive supports.
- d) Replace or upgrade building components to improve energy efficiency.

On an annual basis, Facilities staff will conduct an onsite inspection of each building in consultation with the school-based administrator to evaluate the condition of the building and identify potential projects. In considering priorities for the current year, the Facilities Manager will review the

previous year's prioritized list of PMR projects, along with any current information, request feedback and input from staff and other sources in preparation for current year planning. In addition, other sources of information will be examined, including:

- The overall Facilities Master Plan, which is updated periodically.
- An annual walk through of all facilities by the Maintenance Supervisor.
- Consideration of consultant and engineer reports.
- Asset Planner facility detail.
- Enrolment projection data.
- Requests submitted by administrators.

Potential projects are assessed and prioritized based on five (5) factors: health and safety, building/system integrity, accessibility and inclusivity, programming and aesthetics. Projects are ranked and sorted into fiscal years, with a three-year (3-year) planning timeframe. After internal prioritization, the annual PMR plan is reviewed and approved by the Board in May and then submitted to the Ministry of Education.

4) Minor Renovations Planning

Minor renovation projects include projects that will have an immediate impact on the wellbeing and learning outcomes of students.

These projects are identified during the annual facilities inspections or as requested by the school administrator. They are prioritized annually based on urgency of need and available funding and resources.

5) Maintenance and Inspection

a) General procedures

- i) *The Education Act, 1995* requires the principal to exercise general supervision over the work of all members of staff, including Division employees whose duties relate to the care and maintenance of the school building, its equipment and grounds.
- ii) The principal will ensure requests for maintenance and repair items for the building and grounds comply with Division procedures for routine, high, emergency, and scheduled caretaker procedures.
- iii) To ensure compliance with the National Building Code, National Fire Code, final inspection requirements and Division standards, all proposed construction, changes, additions, alterations or renovations to the interior, the exterior or the grounds of any school in the Division, regardless of the source of funding, must be forwarded to Facilities for review before ordering materials or commencing the work.

b) Regular Inspection of Buildings and Grounds

- i) The principal and caretaker in consultation with the Caretaker Supervisor will establish procedures to monitor the state of the building, grounds and equipment on a monthly basis. Records of such inspections will be filed at the school and, upon request, made available to the Facilities Manager or other senior Division staff.
- ii) An inspection of the building and grounds of every school in the Division will be undertaken by the Facilities Manager and/or Maintenance Supervisor, the principal and the caretaker at least once during each school year. Records of these inspections will be entered into Asset Planner and used for the creation of the Facilities Master Plan.

c) Major Repairs, Renovations and Construction

- i) After an annual school inspection has been completed, the Facilities team will collaborate in making recommendations concerning facility repairs or renovations for consideration in the School Division PMR and budget processes.
- ii) Capital construction or PMR projects that might need to be added to the School Division PMR plan or require a Ministry Major or Minor Capital Project Funding Application, are to be considered by the Facilities Manager, Chief Financial Officer and the Director during the annual capital planning process.

d) Routine Maintenance Requests (Service Requests)

- i) Staff requests for routine maintenance items will be submitted to the principal. If approved by the principal, and if the local caretaker is not able to resolve the issue, the request will be forwarded to the Facilities Department through the Asset Planner.
- ii) Submit individual service requests in accordance with specified categories in Asset Planner (e.g., plumbing repair on one requisition, roofing on another requisition, and electrical on another requisition). Do not combine categories on the same request.

e) High Priority Maintenance Requests (deficiencies that many result in unsafe conditions or equipment/facility damage)

- i) This category includes items that do not pose an immediate health or safety risk but may result in possible minor equipment or facility damage, creating potentially unsafe conditions. If a maintenance worker identifies high priority maintenance issues at a school, it will be referred to the principal who will submit a service request.

f) Emergency Maintenance Requests (deficiencies that are unsafe and require immediate attention)

- i) Emergency maintenance requests are used to identify deficiencies that are unsafe and require immediate action and may result in significant facility or equipment damage or pose a threat to health and safety. Those situations will require the involvement of the Director or designate, authorities having facility or utility jurisdiction such as health regions, the Ministry of Education and can involve full or partial school closure.

- ii) The principal or designate will make immediate contact with the Facilities Manager and follow up with an Asset Planner request. Do not leave a voice message or email for an emergency request.
- iii) The person receiving the emergency request from the principal or designate will act to rectify the emergency and report the emergency and the action taken to the Facilities Manager and Director or designate as soon as possible.
- iv) For after-hours emergencies, the principal or vice principal, shall contact the Facilities Manager, Facilities Supervisor or Caretaker Supervisor. The principal shall follow this with an Asset Planner request. Do not leave a voice message or email for an urgent after-hours request.

g) Additional Information

- i) Caretakers are expected to keep buildings and grounds in a safe, clean, neat and sanitary condition. This includes checking the buildings at least once per day during extended school breaks and the identification and repair of minor maintenance issues.
- ii) Maintenance requests initiated by caretakers will be referred to the principal who will submit a service request including the priority of the request if appropriate.
- iii) During July and August, caretakers may submit maintenance requests by contacting the Facilities Manager or designate by email or phone. They can also check on the status of service requests in Asset Planner

6) Caretaking support

- a) The Facilities Department will create and maintain a caretaking manual.
- b) Caretakers are expected to keep buildings and grounds in a safe, clean, neat and sanitary condition. This includes checking the buildings at least once per day during extended school breaks and the identification and repair of minor maintenance issues.
- c) Maintenance requests initiated by caretakers will be referred to the principal who will submit a service request including the priority of the request if appropriate.
- d) During the months of July and August, caretakers may submit maintenance requests by contacting the Facilities Manager or designate by email or phone. They can also check on the status of service requests in Asset Planner.

7) Environmental Considerations

- a) The Division will endeavour to purchase “environmentally friendly” products that provide the highest possible level of performance.
- b) The efficient use of energy and water will be guiding principles in all renovations, new construction, and operations.

- c) The Division encourages and supports initiatives to reduce, recycle and recover waste materials in all schools and departments.