
Capital Improvements and Charge Costs, Facilities/Maintenance (MOP-P001)

Sacramento City Unified School District

1.1 SCOPE:

- 1.2 This procedure discusses the method that is used to process Facilities Maintenance Chargeable Costs and Capital Improvements for Sacramento City Unified School District.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.1 RESPONSIBILITY:

- 2.2 Program Records Technician

Signature

Date

Signature on file

3.1 APPROVAL AUTHORITY:

- 3.2 Director, Facilities and Maintenance

4.1 DEFINITIONS:

4.2 **Chargeable Costs Maintenance:** Work requests for facilities where the maintenance is not paid for from the general fund and a budget code is required for charge out to specific grants and funds.

4.3 **Capital Improvements Maintenance:** Capital Improvement Maintenance are requested site improvements that are paid for by the site. (Examples of Capital Improvements include but are not limited to the installation of wall mounts, electrical marquees and/or computer network drops.)

4.4 **ESCAPE:** SCUSD Information System

5.1 PROCEDURE:

5.2 Chargeable Cost Maintenance:

- 5.2.1 Must receive an original work order request form with approval signature and budget code. (If an estimate is requested before work can be completed, process as a Capital Improvement Work Order)
- 5.2.2 Enter into School Dude Work Order Maintenance system.
- 5.2.3 Print out a work order for work to be completed.
- 5.2.4 Submit to appropriate Trade Supervisor completion of work.
- 5.2.5 Receive completed work order from Trade Supervisor.
- 5.2.6 Update "Action Box" in School Dude Work Order Maintenance system showing status, which includes dates. Close out completed work order with time, labor and materials.

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- 5.2.7 Print "Detailed Work Order Request" form School Dude Work Order Maintenance System.
- 5.2.8 Copy and file work order with budget signature.
- 5.2.9 Staple original Work Order request to Detailed Work Order.
- 5.2.10 Copy and send original to the Accounting Department for budget transfer and file.

5.2 Capital Improvement Maintenance

- 5.2.1 Must receive an electronic copy with budget code.
- 5.2.2 If requested by site: Copy Work Order. File original Work Order Request and staple the copy of the Work Order to Work Order Job Estimate Form.
- 5.2.3 Send to appropriate Trade Supervisor for written estimate.
- 5.2.4 Receive estimate back from Supervisor.
- 5.2.5 Forward to requesting site's administrator for approval.
- 5.2.6 Next send without capital improvement to shop.
- 5.2.7 When Work Order is completed, close out work order in School Dude Work Order Maintenance system with time and materials.
- 5.2.8 Print "Detailed Work Order Request" form from School Dude Work Order Maintenance system.
- 5.2.9 Copy and file work order with budget signature.

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5.2.10 Staple original Work Order request to Detailed Work Order.

5.2.11 Send original to the Accounting Department for transfer and filing.

6.1 Tracking Report:

6.2 Print monthly reports for Director to review status of Chargeable Cost and Capital Improvements.

7.1 Budget Report Procedure:

7.2 Print monthly site detail reports from ESCAPE to confirm transfer of costs.

8.1 ASSOCIATED DOCUMENTS:

8.2 Work Order Request Form #MOP-F010

8.3 Detailed Work Order Request form from School Dude Work Order Maintenance System (Database created)

8.4 Work Order Job Estimate form #MOP-F005

9.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Work Orders	School Dude	1999 to present	Discard as desired	Public Document

10.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
11/19/04	A	Initial release
09/05/05	B	Revised to include updated form numbers and procedures.
04/02/08	C	Revised title, sections 5.0, 5.2, 6.0, 7.0, 8.0, and 9.0
10/14/08	D	Revised section 2.0, responsibility
09/29/14	E	Revised/Updated