

Facilities Department Standard Operating Procedures

STANDARD OPERATING PROCEDURES
Numbering Sequence SPPS-FAC-X-NNN

PURCHASING: 100 SERIES

M-101 Purchasing Non Stock Items
M-102 Purchasing Restock Inventory Items Without A Blanket Po
M-103 Vendor Returns
M-104 Min/Max Determination
M-105 Vendor Account Establishment
M-106 Restock Blanket Orders
M-107 Restock Expendables
M-108 Add/Remove Parts to Inventory
M-109 Asset Tag I.D.
M-110 Asset without a Tag I.D.
M-111 Ordering Whiteboards

STOREROOM: 200 SERIES

M-201 Receiving Chargeable Inventory
M-202 Receiving Expendable Inventory
M-203 Put Away Chargeable or Expendable Inventory
M-204 Parts Location Change – Scott & Bob Hold
M-205 Picking Chargeable Inventory
M-206 Picking Expendable Inventory
M-207 Cycle Count
M-208 Vehicle Replenishment
M-209 Shipping – Nan & Bob
M-210 Project Returns
M-211 Salvage Returns
M-212 Work Task Returns
M-213 Tool Crib Operations
M-214 Reservable Equipment Scheduling
M-215 Material Naming and Description
M-216 Storage Location Criteria
M-217 Rack Location and Numbering System
M-218 Obsolete Material Disposal
M-219 Tool Repair – Scott & Bob
M-220 Hazardous Material Storage
M-221 Hazardous Waste
M-222

WORK TASKS: 300 SERIES

M-301 Work Request Submission
M-302 Work Request Approval
M-303 Work Task Assigning Trades
M-304 Work Task Resource Request
M-305 Work Task Changing Estimated Completion Date
M-306 Work Task Execution
M-307 Work Task Completion - Single Trade
M-XXX Work Task Completion - Multi Trade – Tim & Brian
M-XXX Preventative Maintenance Work Task
M-XXX Work Tasks Dated in the Future
M-308 Work Task Move to Hold Status
M-309 Work Task Transfer Responsibility to Another Trade
M-310 Change Responsible Organization on Work Task
M-311 Work Task to Planning
M-312 Work Task To Outside Vendor –Mark & Nan (Tim review)
M-313 Work Task Code Compliance Work
M-314 Work Task Warranty Issues
M-315 Work Task Wrench Time
M-316 Multiple Trades Work Tasks
M-317 Emergency Response & Communication – After Hours
M-318 Vehicle Mechanic Not Present
M-319 Work Task Inventory Request(HOLD)
M-320 Contractor Ownership of Buildings – Nan & Tom
M-321 Notes to Resolution Description – Tim & Al
M-322 Non Inventory Stock item to Work Task
M-323 Record Inventory Item to a Work Task
M-324 Survey
M-325 Ordering White Boards

ASSETS: 400 SERIES

M-401 Fleet Assignment
M-402 Decommission Fleet

ACCOUNTING: 800 SERIES

F-801 Packing Slips
F-802 Invoices
F-803 Purchases Over $1,000 - Nan
F-804 Consultant Invoice Summary - Mary
F-805 Pay Applications and Planned Purchase orders - Mary
F-806 Inventory Valuation - Jerry

DEPARTMENT: 900 SERIES

F-901 Update to Handbook
F-902 Cross Docking
F-903 Hiring Civil Service Positions
F-904 Hiring Non Civil Service Positions

Parts/materials not found in the Storeroom may be purchased for a work task. These are non-inventory items.

RESPONSIBILITY ACTIVITY

Trades

1. Item not available in parts inventory
    1.1 Purchase amount below $1,000
    1.2 Locate part to be purchased
    1.3 Order/purchase part using FM# as the pickup number
        1.3.1 FM # must appear on packing slip
        1.3.2 Print name on packing slip
        1.3.3 Trade and site must be on packing slip
        1.3.4 Turn in packing slip to Lead Clerk within one day of purchase
    1.4 Determine need in inventory
        1.4.1 Add to inventory - SOP 108
    1.5 Purchase amount above $1,000
        1.5.1 Notify Foreman

Lead Clerk

2. Add to work task – SOP 321

Foreman

3. Obtain quotes if above $1,000
4. Notify Maintenance Supervisor
5. Create purchase request using eProcurement
6. Purchase request sent to Purchasing Agent

Purchasing Agent

7. Approve purchase order
    7.1 Send purchase order to vendor
        7.1.1 Notify Requestor
        7.1.2 Notify Foreman
    7.2 Reject purchase order
        7.2.1 Notify Requestor

7.2.1.1 Notify Foreman

Foreman

7.3 Notify Trades

7.4 Determine inventory status

7.4.1 Add to inventory - SOP 108

When the min/max report indicates inventory items are required, the Storekeeper can place an order to replenish the inventory items required with vendors who SPPS does not have a contract purchase order.

RESPONSIBILITY ACTIVITY

Storekeeper

1. Review min/max order quantity report

1.1 Quantity below minimum order level

Under $1,000

1.1.1 Refer to preferred vendor list

1.1.2 Create inventory pick up number using FileMaker Pro system

1.1.3 Order item from vendor using IN number

Over $1,000

1.1.4 Review preferred vendor list

1.1.5 Obtain quote

1.1.6 Create purchase request using eProcurement

Purchasing Agent

1.1.7 Approve purchase order

1.1.7.1 Send purchase order to vendor

1.1.8 Reject purchase order

1.1.8.1 Notify Storekeeper

1.2 Quantity not below minimum order level

1.2.1 Take no action

Occasionally materials ordered will arrive with damage, are incorrect, paper work does not match or any other non-conforming issues. When this happens the Storekeeper or person receiving the material will be required to return the material to the vendor.

RESPONSIBILITY ACTIVITY

Storekeeper

1. Review incoming parts or materials
    1.1. RETURN
        1.1.1.Call vendor
        1.1.2.Request return goods authorization number
    1.2. NO RETURN
        1.2.1.Proceed to SOP 201

Vendor

2. Send return goods authorization

Storekeeper

3. Receive return goods authorization
    3.1. Locate material from staging shelves
    3.2. Return parts/materials to vendor

In order to manage inventory levels to minimize the amount and value of the inventory, there is a need to establish and manage the minimum and maximum stocking levels for each part. Once per year the min/max levels will be reviewed and adjusted to reflect the actual need.

RESPONSIBILITY ACTIVITY

Storekeeper/Foreman

1. Set min/max levels for individual stock keeping units

Storekeeper

2. Enter the min/max levels for new parts
3. Monitor the min/max levels
4. Track inventory usage/forecast
5. Update the min/max levels annually or as necessary

Vendors may become a qualified vendor with the District for purchasing parts.

RESPONSIBILITY ACTIVITY

Foreman/Maintenance Supervisor

1. Determine vendor/s to be qualified

Administrative Services

2. Request a completed W9 from the potential vendor
3. Complete New Vendor request on eProcurement
4. If application is required by the vendor

Business Office

4.1. Complete application

4.2. Send completed application to vendor

4.3. Send MN ST3, MN Tax Exempt Certificate to vendor

Vendor

5. Establish account

Administrative Services

6. Notify Foreman/Maintenance Supervisor

Contract purchase orders may be created for vendors that are used for replenishment of stock items. When the min/max report indicates part/s are required, the Storekeeper can place an order to replenish the parts required with a contract purchase order.

RESPONSIBILITY ACTIVITY

Storekeeper

1. Create contract order
    1.1 Review vendors
        1.1.1 Create vendor account if necessary – SOP 105
    1.2 Create purchase request for contract PO order using eProcurement

Purchasing Agent

2. Approved purchase order
    2.1 Send purchase order to vendor
    2.2 Notify Storekeeper
3. Reject purchase order
    3.1 Notify Storekeeper

Expendable items will be restocked when quantities are low.

RESPONSIBILITY ACTIVITY

Trades/Foreman

1. Notify Storekeeper expendable quantities are depleted by giving a restock card to the Storekeeper for reorder.

Storekeeper

2. Review expendable stock prior to creating order
3. Using a blanket purchase order
   3.1 Order restock using blanket order number
4. Purchase under $1,000 with no blanket purchase order
   4.1 Create inventory pick up number using FileMaker Pro system
   4.2 Order item from vendor using IN number
5. Purchase over $1,000 with no blanket purchase order
   5.1 Obtain Quote
   5.2 Create purchase request using eProcurement

Purchasing Agent

   5.3 Approved purchase order
      5.3.1 Send purchase order to vendor
      5.3.2 Notify Storekeeper
   5.4 Reject purchase order
      5.4.1 Notify Storekeeper

Storekeeper

6. Return restock card to bin with items – SOP 203

Parts may need to be added or removed from the current inventory. If a part has been noted by the Trades or a Foreman as necessary to be added, it will be assigned to inventory. If a part has not been utilized for 1 year, it may be deemed unnecessary and removed from inventory.

RESPONSIBILITY ACTIVITY

Trades/Foreman

1. Notify Storekeeper of item to be added or removed from inventory

Storekeeper

2. Determine name and description of item to be added – SOP 215
3. Assign location – SOP 216
4. Determine min/max levels – SOP 104
5. Input item into TRIRIGA
6. Notify Trades/Foreman

Foreman/Storekeeper

7. Determine item to be removed
8. Remove item from inventory
   8.1 Remove item from TRIRIGA
9. Review list of item/s not utilized for 1 year
10. Determine if item/s to be removed
11. Remove item from inventory
    11.1 Remove item from TRIRIGA

Storekeeper

12. Review items to be removed with Maintenance Supervisors
13. Salvage or Auction item/s identified to be removed – SOP 223

Any item purchased and defined as

- Movable Tools and Equipment valued at less than $5,000 (Object Code 6402) i.e. Jack Hammer
- Other Equipment Purchased valued at $5,000 or more (Object Code 6530) i.e. Hotsy
- Other Vehicles Purchased valued at $5,000 or more (Object Code 6550) i.e. Groundsmaster

needs to be "tagged" and entered the Financial Management System (FMS). Property Control stickers track and account for the Asset.

RESPONSIBILITY ACTIVITY

Requestor

1. Purchased item falls into one of the categories listed above
2. Obtain a Property Control sticker from Administrative Services

Administrative Services

3. Gather information on item and complete online form
   - 3.1 Name of item
   - 3.2 Description of item
   - 3.3 Manufacturer
   - 3.4 Serial Number
   - 3.5 Model Number
   - 3.6 Purchase Date
   - 3.7 Gift or Purchase
     - 3.7.1 If purchase obtain purchase order number
   - 3.8 Cost
   - 3.9 Account Code
   - 3.10 Location
     - 3.10.1 Room
4. Provide Property Control sticker to Requestor

Requestor

5. Place Property Control sticker on item as close to serial number as possible

An asset is brought into DSF for maintenance and there is no asset tag.

RESPONSIBILITY ACTIVITY

Mechanic

1. Check equipment for asset tag
    1.1 No tag found
    1.2 Search database for the asset
    1.3 Asset found
        1.3.1 Label asset with the I.D. number
    1.4 Asset not found
        1.4.1 Obtain a Property Control sticker from Administrative Services

Administrative Services

2. Gather information on item and complete online form
    2.1 Name of item
    2.2 Description of item
    2.3 Manufacturer
    2.4 Serial Number
    2.5 Model Number
    2.6 Purchase Date
    2.7 Gift or Purchase
        2.7.1 If purchase obtain purchase order number
    2.8 Cost
    2.9 Account Code
    2.10 Location
        2.10.1 Room
3. Provide Property Control sticker to Mechanic

Mechanic

4. Place Property Control sticker on item as close to serial number as possible

RESPONSIBILITY ACTIVITY

Site

8. Choose location
    - 8.1 Not over an internal or external window
    - 8.2 Not covering anything such as:
        - 8.2.1 Pencil sharpeners
        - 8.2.2 Outlets
        - 8.2.3 Thermostats
        - 8.2.4 Doorstops
        - 8.2.5 If the new whiteboard will be placed over an old blackboard, a carpenter must assist in measurements.
9. Measure the area.

Carpenter

10. Verify that the site's location choice and measurements are correct.

Site

11. Contact Steve Parpart at Neal Slate.
12. Place order.
    - 12.1 Order should be shipped directly to the site.
13. When the order arrives, contact a carpenter.

Carpenter

14. Install the white board.

Chargeable inventory are inventory items stored in a controlled area that will be charged to a work task and managed in TRIRIGA.

RESPONSIBILITY ACTIVITY

Storekeeper

1. Receive and stage material
2. Review for material damage
   - 2.1 Non damaged material
     - 2.1.1 No action necessary
   - 2.2 Damaged material
     - 2.2.1 Mark the packing slip
     - 2.2.2 Take appropriate action - SOP 103
3. Review for shortage or overage
   - 3.1 Non shortage or overage
     - 3.1.1 No action needed
   - 3.2 Shortage
     - 3.2.1 Backorder
       - 3.2.1.1 Mark the packing slip
     - 3.2.2 Non backorder
       - 3.2.2.1 Contact vendor
   - 3.3 Overage
     - 3.3.1 Mark packing slip
     - 3.3.2 Contact vendor
4. Sign/date packing slip
5. Enter receiving into TRIRIGA
6. Match packing slip to invoice – SOP 801

Expendable inventory are bulk items stored in a non-controlled area that do not fall under SOP 201.

RESPONSIBILITY ACTIVITY

Storekeeper

1. Receive and stage material
2. Review for material damage
   - 2.1 Non damaged material
     - 2.1.1 No action necessary
   - 2.2 Damaged material
     - 2.2.1 Mark the packing slip
     - 2.2.2 Take appropriate action - SOP 103
3. Review for shortage or overage
   - 3.1 Non shortage or overage
     - 3.1.1 No action needed
   - 3.2 Shortage
     - 3.2.1 Backorder
       - 3.2.1.1 Mark the packing slip
     - 3.2.2 Non backorder
       - 3.2.2.1 Contact vendor
   - 3.3 Overage
     - 3.3.1 Mark packing slip
     - 3.3.2 Contact vendor
4. Sign/date packing slip
5. Match packing slip to invoice – SOP 801

RESPONSIBILITY ACTIVITY

Storekeeper

1. Prepare material for storage
2. Review TRIRIGA for storage location
3. Move material from incoming staging to storeroom storage location
4. Stock as necessary
5. Return material handling equipment

RESPONSIBILITY	ACTIVITY
Storekeeper	

RESPONSIBILITY ACTIVITY

Requestor

1. Enter part needed into TRIRIGA

Storekeeper

2. Print pick ticket/report
3. Pick parts on pick ticket
4. Note each part and quantity as picked
5. Parts available
   - 5.1 Pick part
   - 5.2 Place on cart or picking container
   - 5.3 Place container in designated area

Trades

6. Retrieve part from designated area
7. Return picking container to Storeroom

Storekeeper

8. Parts not available/short
   - 8.1 Provide on-hand parts to Trades
   - 8.2 Place order for parts – SOP 102/106
   - 8.3 Fill back order
   - 8.4 Notify Trades

RESPONSIBILITY ACTIVITY

Trades

1. Determine expendable parts needed
2. Pick up parts determined
3. Parts depleted
   3.1 Turn in restock card indicating part and part number to Storekeeper

Storekeeper

4. Replenish expendable parts – SOP 102/106

Cycle counting is a philosophy that will help improve the accuracy of inventory but also will give us the vehicle to possibly eliminate the need for the yearend inventory. The frequency should be determined by cost and impact.

To assure that we minimize the amount of time required to do the cycle counting while maintaining integrity in the accuracy the following rules will be used to set the frequency of counting. There are 3 classes of inventory A ($100 or greater), B (between $10 and $100), and C (less than $10). Where A will require counting 4 times per year, B will be counted 2 times, and C will be counted 1 time per year. The counting will take place on a regular basis; at minimum weekly; to minimize the amount of time required for each count.

Responsibility **Activity**

Maintenance Supervisor/Storekeeper

1. Establish the cycle count frequency for each item
   1.1 Each item must be counted at a minimum annually
   1.2 Enter the cycle count into TRIRIGA

Storekeeper

2. Perform the cycle count on a periodic basis
   2.1 Print the cycle count worksheet
   2.2 Count the parts selected for the period and enter the actual count on the form
3. Investigate any discrepancy
   3.1 Enter the count adjustment into TRIRIGA
   3.2 Print out a discrepancy sheet and forward to the Maintenance Supervisor

Maintenance Supervisor

4. Review the discrepancy report
5. Implement corrective actions to minimize errors
6. Annually review the cycle count frequency and adjust if necessary

Replenishment of vehicles should be limited to once a week.

RESPONSIBILITY ACTIVITY

Trades

1. Request material

Storekeeper

2. Print pick ticket

2.1 MATERIAL AVAILABLE

2.1.1 Pick material

2.1.2 Place material in designated area

2.1.3 Record picked items into TRIRIGA

2.2 MATERIAL NOT AVAILABLE

2.2.1 Note inventory shortage on pick ticket

2.2.2 Pick available material

2.2.3 Place material in designated area

2.2.4 Order material – SOP 102/106

2.2.5 Record picked items into TRIRIGA

Trades

3. Put material away in vehicle

RESPONSIBILITY ACTIVITY

Storekeeper

1. Receive material in designated location
2. Prepare material for shipping
3. Weigh material and prepare labels and necessary paper work
4. Ship material

Additional quantities should be in alignment with the SPPS Design Standards…….

RESPONSIBILITY ACTIVITY

Project Manager/Maintenance Supervisor/Foreman

1. Discuss materials to be returned
    1.1 NOT AUTHORIZED
        1.1.1 PM notifies Contractor to dispose of materials
    1.2 AUTHORIZED

Project Manager

2. Label item/s as a project return
    2.1 Include on label
        2.1.1 School
        2.1.2 Project #
        2.1.3 Date Returned

Labor Crew

        2.1.4 Return selected material to Storeroom

Storekeeper

        2.1.5 Store returned material
        2.1.6 Record storage location

RESPONSIBILITY ACTIVITY

Foreman/Project Manager

1. Reviews items for salvage return
2. NOT AUTHORIZED
   - 2.1 Foreman notifies Contractor to dispose of materials
   - 2.2 Foreman notifies Trades to dispose of materials – SOP 223
3. AUTHORIZED
   - 3.1 Advise Contractor/Trade to pull material and set aside
   - 3.2 Label items as a salvage return
     - 3.2.1 Include on label
       - 3.2.1.1 Trade
       - 3.2.1.2 School
       - 3.2.1.3 Date Returned

Labor Crew

- 3.2.2 Return salvaged material to Storeroom

Storekeeper

- 3.2.3 Store salvage material
- 3.2.4 Record in TRIRIGA

Intact, unused inventory items must be returned if not used on a work task.

RESPONSIBILITY ACTIVITY

Trades – Material to Storeroom

1. Returns selected material to Storeroom

    1.1 Places parts in a separate bin

    1.2 FM # must be clearly labeled on the return container

Storekeeper

2. Validates returned parts
3. Reclaims parts in inventory

Trades – Material to Vehicle

4. Keeps selected parts in vehicle

    4.1 Notify Storekeeper of location change

Storekeeper

5. Change location of material in TRIRIGA

Each tool will have a control/inventory number that identifies it in the tool crib.

RESPONSIBILITY ACTIVITY

Trades

1. Request tool from Storekeeper

Storekeeper

2. Select tool

2.1 TOOL AVAILABLE

2.1.1 Log out tool

2.1.2 Give tool to Trades

2.1.3 When complete, return tool to Storekeeper

2.1.4 Log tool into TRIRIGA

2.2 TOOL NOT AVAILABLE

2.2.1 Pull tool from outside renter

2.2.2 Inform Trades

Trades

2.2.3 Notify Foreman

Foreman

2.2.4 Determine to rent or buy

2.2.4.1 Rent

2.2.4.2 Buy

2.2.4.2.1 Show need: more/different special/broken

2.2.4.2.2 Obtain approval from Maintenance Supervisor

2.2.4.2.3 Inform Storekeeper to order

Storekeeper

2.2.5 Get quotes

2.2.6 Purchase – SOP 101

RESPONSIBILITY ACTIVITY

Trades

1. Verify equipment requirement

2. Complete Request Form

Labor Crew

3. Select equipment

    3.1 EQUIPMENT AVAILABLE

        3.1.1 Log out the equipment to Trades

        3.1.2 Release equipment to Trades

    3.2 EQUIPMENT NOT AVAILABLE

        3.2.1 Inform Trades

    3.3 NEED EQUIPMENT TO COMPLETE JOB

        3.3.1 Notify Foreman

RESPONSIBILITY ACTIVITY

Material naming shall include: family name, material item is made from, size and other description feature necessary to make finding the part easy.

Storekeeper

1. Review request for adding a new stock keeping item – SOP 108
2. Review naming and description procedure
3. Apply new name and description

Management will establish the storage location criteria for storerooms, vehicles and sites.

RESPONSIBILITY	ACTIVITY

Storekeeper

1. Move the stock keeping units to proper location.
2. Review request for adding or removing a stock keeping item – SOP 108
3. Update the storage location on TRIRIGA.

Rack locations will be labeled in a proposed way to ensure consistency throughout all the storeroom locations.

RESPONSIBILITY ACTIVITY

Storekeeper

1. Use the layout below for location identification in the storerooms. NN-NN-X-N-X
   - 1.1 Storeroom number = NN
   - 1.2 Row number = NN
   - 1.3 Rack Letter = X
   - 1.4 Shelf number = N
   - 1.5 Bin letter = X
   - 1.6 Example 01-20-B-4-B
     - 1.6.1 Storeroom 1
     - 1.6.2 Row 20
     - 1.6.3 Rack B (second rack in the row)
     - 1.6.4 Shelf 4 (4th shelf from the top)
     - 1.6.5 Slot B (2nd bin from the left)

2. Use the following list indicating locations and materials stored in each location
   - 2.1 Storeroom 1 (Main) - Inventoried, labor, grounds material, tool room
   - 2.2 Storeroom 2 (Large Mezzanine) – ¼ Overflow for storeroom (maybe slow movers or expensive items), ¼ Custodial inventory, ½ leftover project material and salvaged materials
   - 2.3 Storeroom 3 (Carpenter Mezzanine) - Carpentry non inventory items
   - 2.4 Storeroom 4 (Mason Garage in Runway) - Grounds gas item, Mason gas and job materials
   - 2.5 Storeroom 5 (Mason Mezzanine) - Ceramic tiles, Mason non inventory items, roofer non inventory items
   - 2.6 Storeroom 6 (Mason main level) - Grounds Gas
   - 2.7 Storeroom 7 (Sheetmetal Mezzanine) - Seasonal Labor and Grounds Items
   - 2.8 Storeroom 8 (North entrance to runway) - Gas powered grounds and custodial
   - 2.9 Storeroom 9 (Carpenter Shade Shop) – Shade and Blind Items

Material, equipment, and tools may be deemed no longer needed or functional and may be disposed of by an auction or destruction. An annual review will be conducted to make these determinations.

Responsibility **Activity**

Maintenance Supervisor

1. Establish the time annually for the review process
2. Identify an area to be used for storage for items no longer needed
3. Request Foreman review all tools and material and identify those no longer needed
4. Request the Storekeeper review stock inventory for items that are no longer needed

Storekeeper

5. Review inventory items and identify any items no longer needed
6. Create a list of items for the Maintenance Supervisors

Foreman

7. Review items stored in the shops, vehicles, and other locations and identify any items no longer needed
8. Review tools and equipment to determine either obsolete or unusable
9. Create a list of items for the Maintenance Supervisors

Maintenance Supervisor

10. Review the lists supplied by the Foreman and Storekeeper
    10.1 List scrapped items
    10.2 List items to be sold at auction
11. Notify the Foreman and Storekeeper as to the final disposal of all items
12. Determine if any item is on property control asset program
    12.1 Follow asset disposal procedure found at http://businessoffice.spps.org/disposal.html

Storekeeper

13. Remove all items that have been approved for disposal
    13.1 Delete the items from inventory in TRIRIGA – SOP 108
    13.2 Move items to the identified collection area

Foreman

14. Remove all items that have been approved for disposal

    14.1 Move items to the identified collection area

Maintenance Supervisor

15. Determine if there is a need for an auction
16. Conduct the auction

RESPONSIBILITY ACTIVITY

Storekeeper

1. Receive tool in designated location
2. Prepare repair labels and necessary paper work
3. Prepare tool for shipping
4. Ship tool

Hazardous includes flammable, corrosive, explosive, and other materials or a health hazard (poison) or is labeled as hazardous material.

RESPONSIBILITY ACTIVITY

Trades/Foreman

1. Materials labeled as hazardous to be stored/handled at DSF.
2. Review the Safety Data Sheet (SDS) (formerly MSDS).
3. Contact Environmental Services Group to determine proper storage.

If an item has been identified as hazardous, proper disposal is required.

RESPONSIBILITY ACTIVITY

Trades/Foreman

1. Identify potential materials labeled as hazardous.
2. Check the Safety Data Sheet (SDS) (formerly MSDS) to see if the item is hazardous.
   2.1 Any questionable item should be addressed by the Environmental Services Group.
3. Contact Environmental Services Group to determine proper disposal.

RESPONSIBILITY ACTIVITY

Building Engineer

1. Identify maintenance issue
2. Review TRIRIGA request history to determine if there is already a submitted request or an existing work task
   - 2.1 There is no existing work task
     - 2.1.1.1 If emergency work request
       - 2.1.1.1.1 Call One Stop Shop – 651-744-1800
       - 2.1.1.1.2 See step 4
     - 2.1.1.2 If no emergency
       - 2.1.1.2.1 See step 5

Administrative Services

3. Receive emergency call
   - 3.1 Ask for a brief description of the emergency
   - 3.2 Determine which trade
   - 3.3 Transfer call to the trade office
     - 3.3.1 Foreman answers
       - 3.3.1.1 Fully transfer call
     - 3.3.2 Foreman does not answer
       - 3.3.2.1 Take message
       - 3.3.2.2 Call Foreman on cell phone
     - 3.3.3 Foreman does not answer cell phone
       - 3.3.3.1 Call appropriate Maintenance Supervisor

Building Engineer

4. Enter emergency work request in TRIRIGA
   - 4.1 Check the box indicating it was an emergency request
5. If normal work request
   - 5.1 Enter normal work request into TRIRIGA
     - 5.1.1 There is an existing work task
       - 5.1.1.1 Do not submit a duplicate request
       - 5.1.1.2 If the work task has become an emergency, call One Stop Shop – 651-744-1800

5.1.1.3 See step 3

RESPONSIBILITY ACTIVITY

Non Building Engineer

1. Identify issue
2. Review TRIRIGA request history to determine if there is already a submitted request or an existing work task
   2.1 There is no existing work task
3. Enter normal work request into TRIRIGA
   3.1 Click the radio button to choose a request is for someone else
   3.2 Enter building in request is for
   3.3 Complete work request and submit

RESPONSIBILITY ACTIVITY

Foreman

1. Review the work request
2. Take site visit, if necessary
   2.1 Add notes to work request
3. Return work request for more information, if necessary
   3.1 Return to Building Engineer with an indication of what additional information is needed
4. Retire the work request if the work will not be done
   4.1 Retire the request while notifying the Building Engineer of the reason
5. Change work request to emergency, if necessary
   5.1 Change priority to emergency
6. Determine if planning department project
   6.1 Approve work request
   6.2 Reassign to Maintenance Supervisor
7. Extensive multiple trade work request (Foreman's discretion)
   7.1 Approve work request
   7.2 Reassign to Maintenance Supervisor
8. Requires outsource, if necessary
   8.1 Approve work request
   8.2 Contact vendor/contractor
      8.2.1 Update work task
9. Approve work request
   9.1 Becomes a work task

RESPONSIBILITY ACTIVITY

Foreman

1. Work task where responsible organization is your trade
   1.1 Assign personnel from your trade
   1.2 Request resources from other trades, if necessary – SOP 304
2. Work task where responsible organization is not your trade
   2.1 Review the work task
   2.2 Reassign responsible organization – SOP 309

RESPONSIBILITY ACTIVITY

Foreman

1. Work task where responsible organization is another trade
   1.1 Respond to request for resources from another trade
2. Work task where you need a resource from another trade
   2.1 Request resources from other trade
   2.2 Specify date needed, if necessary

RESPONSIBILITY ACTIVITY

Foreman/Trades

1. Review estimated completion date on the work task
    1.1 Modify the estimated completion date as necessary

RESPONSIBILITY ACTIVITY

Trades

1. Review the work task
2. If estimated completion date needs to be modified
   2.1 Modify date and notify Foreman – SOP 305
3. Contact Building Engineer when arriving at site
   3.1 If Building Engineer not available, leave message
4. Perform work task
5. Document activity on work task before leaving location of work
   5.1 Post wrench time in time log to nearest quarter hour for each visit - SOP 315
   5.2 Add description for time entry
   5.3 Add comments if necessary
6. Record inventory Item – SOP 322
7. If work task needs a resource from another trade
   7.1 Notify Foreman

Foreman

8. Proceed to SOP 304

Trades

9. If Work Task needs to be put on-hold
   9.1 Put work task on hold and notify Foreman - SOP 308
10. If responsibility for the work task needs to be transferred to another Trade
    10.1 Notify Foreman

Foreman

11. Proceed to - SOP 309

Trades

12. If the Work Task needs to be forwarded to planning
    12.1 Notify Foreman

Foreman

13. Forward to Maintenance Supervisor - SOP 309

Trades

14. If the work task is ready to be completed

14.1 Ensure all time is entered

14.2 Ensure all unused materials are returned – SOP 212

14.3 Return tools to crib – SOP 213

14.4 Lift /scaffold etc used

14.4.1 Complete truck ticket for pickup

14.5 Add Resolution Description – SOP 321

14.6 Check My Portion Complete box

RESPONSIBILITY ACTIVITY

Trades

1. Review Work Task for accuracy of time entry records - SOP 315
    1.1 Add any comments as necessary
2. Complete your portion of the Work Task

Foreman for Responsible Organization

3. Review the work task and verify that it is complete for all resources
4. Review Trades hours and materials
    4.1 Hours and material
    4.2 Not complete
        4.2.1 Notify the Trades
        4.2.2 Uncheck Foreman Review box
5. Complete the Work Task when it returns to your “Pending Completions”
6. Send out survey – SOP 324

RESPONSIBILITY ACTIVITY

Trades

1. Review Work Task for accuracy of time entry records - SOP 315
    1.1 Add any comments as necessary
        1.1.1 Use resolution description to notify your Foreman of status so Foreman can add other organizations if desired.
2. Complete your portion of the Work Task

Foreman for Responsible Organization

3. Review the work task that is complete for all resources.
    3.1 Check resolution description box for status of other organizations.
    3.2 Notify other organizations of status as necessary.
4. Review Trades hours and materials
    4.1 Hours and material
    4.2 Not complete
        4.2.1 Notify the Trades
        4.2.2 Uncheck Foreman Review box
5. Complete the Work Task when it returns to your “Pending Completions”
6. Send out survey – SOP 324

Put in a work task for work at a future date.

RESPONSIBILITY ACTIVITY

Foreman

1. Identify work that needs to be performed at a later date.
2. Establish future date for the work to be started.
3. Create work task – SOP 301.5
   3.1. Assign the future start date to the work task.
   3.2. Type in the original FM # for work completed in the description.

Hold a work task before completion.

RESPONSIBILITY	ACTIVITY

Foreman

1. Review work task status
2. Identify issues
3. Hold work task
4. Review work task status
5. Restart work task

RESPONSIBILITY ACTIVITY

Foreman Currently Responsible

1. Re-assign work task to appropriate trade
   1.1 Document the reason in the resolution description box
2. Communicate with the appropriate Foreman that you have reassigned a work task

Foreman To Whom Responsibility Has Been Transferred

3. Review the work task
4. Assign the work task to appropriate Trades - SOP 303

The Foreman may choose to reassign the Assigned Work Task if it does not accurately depict the nature of the work required.

RESPONSIBILITY ACTIVITY

Foreman

1. Review the Assigned Work Task
2. Verify that Responsible Organization is correct for this work task
    2.1. No
        2.1.1. Reassign to the correct Responsible Organization
3. Contact correct Responsible Organization and notify of this change

Before work task is completed, it is sent to Planning. This is a temporary SOP until Planning is on TRIRIGA.

RESPONSIBILITY ACTIVITY

Foreman/Maintenance Supervisor

1. Review project details
2. Assign a Maintenance Supervisor as a resource - SOP 304

Maintenance Supervisor

3. Place on "Hold per Requester" - SOP 308
4. Add comment in comment section and resolution description stating "placed on hold, forwarded to appropriate party (name)".
5. Print work task as a PDF file and save to PC
   5.1 file name format = FM-XXXXXXX, facility name, short description
6. Send work task to appropriate party as an email attachment

RESPONSIBILITY ACTIVITY

Building Engineer

1. Identify maintenance issue that are covered by contract orders; low voltage/AV Equipment, elevators/stage lifts, pest, generators, fire sprinklers, fire panel, fire extinguishers, chillers, garage doors, security gates, kitchen refrigeration, automotive lifts
2. Submit a work order request – SOP 301
3. Contact the vendor with contract order to initiate work

Vendor

4. Complete the work
5. Notify building engineer

Building engineer

6. Validate work
7. Notify Foreman

RESPONSIBILITY ACTIVITY

Code compliance request classes can include but are not limited to: Boiler, Daycare, Elevator, Fire, Kitchen (health), Nurse or Playground

Safety Specialist/Building Engineer

1. Has a code compliance report been received
   - 1.1 Yes
     - 1.1.1 Submit request – SOP 301
     - 1.1.2 Check box on request form indicating the work is in response to a code compliance notice
   - 1.2 Due by date noted on report
     - 1.2.1 Write due date in the description
   - 1.3 Provide a copy of the compliance report to Foreman

Foreman

2. Approve work request – SOP 302

RESPONSIBILITY ACTIVITY

From time to time the work requested is for a product that is covered under warranty. When this occurs we want to identify it as soon as possible so as not to void the warranty by performing work on it. As soon as it is identified, or we believe it may be under warranty the appropriate project manager needs to be informed.

Building Engineer

1. Note potential warranty concerns on work request

    1.1 Submit Request - SOP 301

Foreman

2. Review work request for potential warranty issues

    2.1 Potential warranty work

        2.1.1 Add comment to work task indicating potential warranty issue

        2.1.2 Reassign work task to Maintenance Supervisor

    2.2 Non warranty work

        2.2.1 Proceed to SOP 303

Maintenance Supervisor

3. Forward work task to Planning to review documentation and history to verify warranty status

Planners

4. Warranty valid and active

    4.1 Contact original vendor to perform warranty repair

5. Warranty invalid

    5.1 Notify Maintenance Supervisor

Maintenance Supervisor

6. Reassign work task to Foreman with comment
7. Proceed to SOP 303

RESPONSIBILITY ACTIVITY

Trades

1. Log hours on work task by date to nearest quarter hour
2. Wrench time includes
   - 2.1 TRIRIGA time
   - 2.2 Repair work
   - 2.3 Analyzing
   - 2.4 Diagnosis
   - 2.5 Investigation
   - 2.6 Part Ordering
   - 2.7 Part Pick Up
   - 2.8 Delay situations, i.e. cannot get into a classroom for x minutes, put in time and mark in notes
3. Not Included
   - 3.1 Travel time
     - 3.1.1 To site
     - 3.1.2 To parts store
     - 3.1.3 To storeroom for parts

RESPONSIBILITY ACTIVITY

Primary Foreman

1. Review work request
2. If multiple workgroups required (trade managed)

   3.2 Approve work request – SOP 302

   3.3 Assign work task – SOP 303

   3.4 Notify requested work group Foreman of resource requirement

   3.4.1 Indicate date resource needed

Secondary Foreman

   3.5 Review resource request

   3.6 Assign resources on work task – SOP 303

Primary Foreman

4. If multiple work groups required (Maintenance Supervisor managed) – option for Primary Foreman

   4.1 Add comments to work request

   4.2 Change responsible organization to Maintenance Supervisor

Maintenance Supervisor

5. Assign resources to work task
6. Coordinate scheduling between all parties
7. Complete work task - SOP 307
8. Maintenance Supervisor will periodically evaluate type and number of work tasks that involve multiple trades to look for trends and response times.

RESPONSIBILITY ACTIVITY

Management

1. Review the procedure with staff

Manager/Supervisor

2. Availability
   - 2.1 Management is required to have access to a District Smartphone 24 hours/day, 7 days/week, unless on vacation or utilizing a sick day
   - 2.2 Monitor Smartphone for notification of afterhours building/grounds emergency
3. When notified of an afterhours emergency:
   - 3.1 Assess Situation
     - 3.1.1 Determine if other facilities staff is needed and contact appropriate manager
       - 3.1.1.1 Custodial
       - 3.1.1.2 Environmental Health & Safety
       - 3.1.1.3 Grounds & Labor
       - 3.1.1.4 Planning
       - 3.1.1.5 Maintenance
       - 3.1.1.6 Distribution
     - 3.1.2 Select appropriate Manager/Supervisor to be the lead and the single point of contact for coordination/communication
     - 3.1.3 Determine if contractor/vendor is required for work and contact/mobilize as appropriate
   - 3.2 Determine impact at the site level
     - 3.2.1 Will the building have heat, electricity, running water, working toilets?
     - 3.2.2 What percentage of the building is affected?
     - 3.2.3 Is there a health & safety risk?
   - 3.3 Monitor response and progress
     - 3.3.1 Communicate updates to ECC
   - 3.4 Escalate information in a concise manner to Supervisor, by 4 AM, if impact is large and

if unsure if repair will be complete prior to start of school

Assistant Facilities Director

4. Availability
   - 4.1 Assistant Facilities Director is required to have access to a District Smartphone 24 hours/day, 7 days/week, unless on vacation or utilizing a sick day
   - 4.2 Monitor Smartphone for notification of afterhours building/grounds emergency
   - 4.3 Act as Facilities Director when Facilities Director is on vacation, out of town, or utilizing a sick day
5. When notified of an afterhours emergency:
   - 5.1 Receive update from Manager/Supervisor
   - 5.2 Make assessment of impact – site based
     - 5.2.1 Will the building have heat, electricity, running water, working toilets?
     - 5.2.2 What percentage of the building is affected?
     - 5.2.3 Is there a health & safety risk?
   - 5.3 Make assessment of operations impact
     - 5.3.1 Determine if other operations departments need to be contacted
       - 5.3.1.1 Nutrition Services
       - 5.3.1.2 IT
       - 5.3.1.3 Transportation
       - 5.3.1.4 Security & Emergency Management
6. Escalate
   - 6.1 Make recommendation to Facilities Director by 4 AM

Facilities Director/Assistant Director

7. Availability
   - 7.1 Management is required to have access to a District Smartphone 24 hours/day, 7 days/week, unless on vacation or utilizing a sick day
   - 7.2 Monitor Smartphone for notification of afterhours building/grounds emergency
8. When notified of an afterhours emergency:
   - 8.1 Receive update from Assistant Facilities Director or Manager/Supervisor
   - 8.2 Make assessment of impact – site based
     - 8.2.1 Will the building have heat, electricity, running water, working toilets?

8.2.2 What percentage of the building is affected?

8.2.3 Is there a health & safety risk?

8.3 Make assessment of operations impact

8.3.1 Determine if other operations departments need to be contacted

8.3.1.1 Nutrition Services

8.3.1.2 IT

8.3.1.3 Transportation

8.3.1.4 Security & Emergency Management

8.3.2 Contact directors as required

9. Escalate

9.1 Make recommendation to Chief Operating Officer by 4:15 AM

In the event the Vehicle Mechanic is out for an extended period of time.

RESPONSIBILITY ACTIVITY

Trades

1. Grounds vehicles and power equipment
   1.1 The Grounds Foreman will make arrangements for repairs
2. Labor vehicles and power equipment
   2.1 The Labor Foreman will make arrangements for repairs
3. Other Trades
   3.1 During business hours
      3.1.1 Minor vehicle problems (stuck, battery dead, etc.)
         3.1.1.1 Contact the Grounds Foreman for assistance
      3.1.2 If necessary, contact the towing company listed in the vehicle information envelope in the glove box
   3.2 After business hours
      3.2.1 Contact the towing company listed in the vehicle information envelope in the glove box
4. Maintenance Supervisor
   4.1 Utilize the Unit Repair Reference Sheet provided by the Vehicle Mechanic to arrange all other necessary repairs.

RESPONSIBILITY ACTIVITY

Trades

1. Determine needed Inventory Items
    1.1 Identify inventory items
        1.1.1 Send inventory item request to Storekeeper
        1.1.2 Proceed to SOP 318
    1.2 Identify non-stock items needed to complete work task
        1.2.1 Proceed to SOP 101

RESPONSIBILITY	ACTIVITY

A resolution description is a brief description of what work was completed and what parts or equipment were used. A work task cannot be completed without this description. Work tasks will not be closed by the Foreman until resolution descriptions are completed.

RESPONSIBILITY ACTIVITY

Single Trade Work Task

1. Each resolution noted must be followed with a communication to other tradesperson working on the task involved.
2. At completion of a work task – SOP 307
   - 2.1 Enter information in the resolution description that will assist future work on the same item.
     - 2.1.1 Part number, tile color, paint color etc.
     - 2.1.2 Specific equipment required to do the work. i.e lift #2
     - 2.1.3 Location of valves, breakers or special issues particular to solving this work task etc.
   - 2.2 Check the ready for Foreman review box

Multi Trade Work Task

3. At completion of a work task – SOP 307
   - 3.1 Enter information in the resolution description that will assist future work on the same item.
     - 3.1.1 Part number, tile color, paint color etc.
     - 3.1.2 Specific equipment required to do the work. i.e lift #2
     - 3.1.3 Location of valves, breakers or special issues particular to solving this work task etc.
4. Primary use this box to notify secondary the task is ready for them

Responsible Organization

5. Note if there will be additional work after secondary (two or more) is complete.

Secondary Trade

6. When complete, note in resolution box and no other work due by responsible org,
7. Complete my portion button.
   - 7.1 Labor is often the last group on a task. Be sure to include them in all communications.

When trades purchase a non-stock inventory item, the purchase will be recorded against the work task.

RESPONSIBILITY ACTIVITY

Trades

1. Purchase is complete
2. Packing slip is given to clerk – SOP 801

Clerk

3. Put non stock purchase into TRIRIGA and the specific work task

When trades require an inventory item, the use of said item(s) will be recorded against the work task.

RESPONSIBILITY ACTIVITY

Trades

1. Identify the required inventory items on the Work Task

Storekeeper

2. Requested Parts are in stock and available
    - 2.1 Yes
        - 2.1.1 Issue Parts to the Work Task
        - 2.1.2 Kit Parts
    - 2.2 No
        - 2.2.1 Order inventory items for Work Task – SOP 102
        - 2.2.2 Receive items into TRIRIGA – SOP 201
        - 2.2.3 Issue Parts to the Work Task
        - 2.2.4 Kit Parts

Trades

3. Collect Parts from Storekeeper
4. Unused parts
    - 4.1 Yes
        - 4.1.1 See SOP 212

RESPOSNSIBILITY ACTIVITY

System

1. After randomly selected work tasks have been completed
2. Survey sent to Customer

Customer

3. Complete survey and submit

Foreman

3. Review survey
   - 3.1 Standard response
     - 3.1.1 Review with Trades forward to Maintenance Supervisor
   - 3.2 Positive response
     - 3.2.1 Review with Trades and forward to Maintenance Supervisor
   - 3.3 Issues identified
     - 3.3.1 Review issues with Trades and forward to Maintenance Supervisor
     - 3.3.2 Send resolution to Maintenance Supervisor

Maintenance Supervisors

4. Review survey
   - 4.1 Standard response
     - 4.1.1 File
   - 4.2 Positive survey
     - 4.2.1 Take appropriate recognition steps
     - 4.2.2 File
   - 4.3 Issues identified
     - 4.3.1 Address
     - 4.3.2 Respond to Customer

RESPONSIBILITY ACTIVITY

Site

1. Choose location
    1.1 Not over an internal or external window
    1.2 Not covering anything including
        1.2.1 Pencil sharpeners
        1.2.2 Outlets
        1.2.3 Thermostats
        1.2.4 Doorstops
        1.2.5 If the new whiteboard will be placed over an old blackboard, a carpenter must assist in measurements
2. Measure the area

Carpenter

3. Verify that the site's location choice and measurements are correct.

Site

4. Contact Steve Parpart at Neal Slate.
5. Place order.
    5.1 Order should be shipped directly to the site.
6. When the order arrives, contact a carpenter.

Carpenter

7. Install the white board.

RESPONSIBILITY ACTIVITY

1. Vehicles will be assigned to a shop or group, not an individual.
2. Shop/Group has a vehicle
   - 2.1 No
     - 2.1.1 New vehicles will be assigned to the most senior Trade who is not currently assigned a vehicle (SPPS start date seniority)
   - 2.2 Yes
     - 2.2.1 New vehicles will be assigned to the most senior Trade who is not currently assigned a vehicle (SPPS start date seniority)
     - 2.2.2 Once all Tradespersons in a shop have been assigned a vehicle, the new vehicle will replace the shop vehicle that is oldest and/or in the worst mechanical condition.
3. Backfill Vehicles
   - 3.1 No
     - 3.1.1 Vehicle will be disposed of – SOP 402
     - 3.1.2 Vehicle will be sold at auction
   - 3.2 Yes

Maintenance Supervisor

- 3.2.1 Will determine which shop and trade will use this vehicle.

RESONSIBILITY ACTIVITY

Maintenance Supervisor

1. Determine unit/s to be decommissioned

Mechanic

2. Red tag unit by placing a red tag on rearview mirror
3. Accessories for unit will be placed with it (plow placed in or on it).
4. All incidentals will be removed if possible; GPS, Radio, Fire Extinguisher, Tool Box etc.
5. Unit will be placed with other out of service equipment
6. Keys for unit will be turned in to Maintenance Supervisor

Administrative Services

7. Cancel insurance with Business Office
8. Contact ARI to auction unit

ARI

9. Pickup unit and complete auction process
10. Send check to SPPS

These are packing slips received for non stock items.

RESPONSIBILITY ACTIVITY

Trades

1. Pick up part need
2. Receive a packing slip
3. Order is complete
   - 3.1 No
     - 3.1.1 Note on the packing slip what has not been received.
4. Be sure the following information is on the packing slip
   - 4.1 Your name
   - 4.2 FM #
   - 4.3 Trade
   - 4.4 School
5. Give the packing slip to the Clerk

RESPONSIBILITY ACTIVITY

Accounting

1. Consultant invoice is received and printed

Project Manager

2. Generate the initial A/E Consultant Invoice Summary for each project
3. Completing the following on the first page of the summary
    3.1 SPPS project number
    3.2 Project title
    3.3 Project Manager name
    3.4 Original base fee
    3.5 Additional base fee
    3.6 Project scope
    3.7 Budget code
4. Email summary to the consultant working on the project

Consultant

5. Complete the appropriate summary #
    5.1 Include invoice
    5.2 Include backup documentation
    5.3 Return to Facilities Accounting at 1930 Como

Accounting

6. Check all numbers
7. Ensure appropriate backup is attached
8. Track each invoice on a spreadsheet
9. Deliver to the Project Manager

Project Manager

10. Review
11. Sign off
12. Return to Accounting

RESPONSIBILITY ACTIVITY

Accounting

1. Pay Apps/ Planned Purchase Orders received
    1.1 Attach tracking sheet
    1.2 Foot and cross-foot the G702 and G703
    1.3 Verify the budget codes and distribution
    1.4 Check retainage
    1.5 Log the app
    1.6 Give to Project Manager

Project Manager

2. On first Pay App
    2.1 Check the budget code
3. On all Pay Apps
    3.1 Verify documents are official AIA forms
    3.2 Verify the GC invoice is attached
    3.3 Verify wet seals of GC and A/E
    3.4 Verify accuracy of billing percentage
    3.5 Verify all change orders billed against are filed
        3.5.1 If the amount requested and amount certified are different
            3.5.1.1 Verify explanation statement
4. If project is final
    4.1 Check to ensure all final paperwork is attached to the Pay App

Facility Planning Manager

5. Approve Pay App
6. Return to Accounting

There are multiple ways to account for the value of inventory that can be used. SPPS has determined to use the First In First Out (FIFO) method.

Responsibility Activity

Initial Valuation (Completed in 2013)

Foremen

1. Determine the current price for each item assigned to their shop.
2. Enter that price on the inventory spread sheet.
3. Turn the completed inventory spread sheet into their supervisor.

Supervisor

4. Review the inventory spread sheets prior to turning them in for data input
5. Reconcile any discrepancies
6. Turn the completed inventory spread sheets in to the Administration team for inputting.

Administration

7. Perform the data entry into the inventory spread sheet.
8. Give the completed spread sheet to Data Coordinator uploading into TRIRIGA.

Ongoing Valuation

9. Receive part and put into TRIRIGA - See SOP 201/202

All maintenance invoices should have an FM number tying it to a work order in TRIRIGA. For groups of 25 or more invoices, a spreadsheet should be made.

RESPONSIBILITY ACTIVITY

Clerk

1. Receive and date stamp invoices
2. Match invoice with corresponding packing slip
   2.1 Ensure invoice quantities matches packing slip quantities
3. Enter invoice total as a non-stock item in TRIRIGA
   3.1 Enter 1 as the quantity
   3.2 Enter the invoice total as the “Rate”
   3.3 Type the vendor name in the “Description” box
   3.4 Enter the invoice total as the “Actual Cost”
4. Label the invoice with the correct budget code and shop
5. Send to the appropriate people for approval signatures in yellow folders on Mondays

Foreman/Supervisors

6. Confirm purchase and sign showing approval
7. Return yellow folder to the clerk by noon on Tuesday

Clerk

8. Review to ensure invoices are complete
9. Send invoices to 360

RESPONSIBILITY ACTIVITY

Clerk

1. Receive and date stamp invoice
2. Match invoice with the corresponding packing slip
   2.1 Ensure invoice quantities matches packing slip quantities
3. Ensure PO # is on invoice
4. Receipt the invoice in eProcurement
   4.1 Write receipt # on invoice
5. No supervisor approval signature is necessary
6. Send to 360

RESPONSIBILITY ACTIVITY

Clerk

1. Receive and date stamp invoices
2. Match invoice with the corresponding packing slip
   2.1 Ensure invoice quantities matches packing slip quantities
3. Enter invoice total as a non-stock item in TRIRIGA
   3.1 Enter 1 as the quantity
   3.2 Enter the invoice total as the “Rate”
   3.3 Type the vendor name in the “Description” box
   3.4 Enter the invoice total as the “Actual Cost”
4. Label the invoice with the budget code, and shop
5. Create req in eProcurement
   5.1 Select Foreman emp # that corresponds to the purchase
   5.2 In req name and description, use the word CONFIRMING
   5.3 Complete req , attach invoice and submit
6. Keep invoice in holding file until PO Dispatched
   6.1 Monitor request daily
7. Receipt invoice
8. Put PO # and rec # on invoice
9. Send to 360

RESPONSIBILITY ACTIVITY

Clerk

1. Receive and date stamp invoices
2. Match invoice with the corresponding packing slip
   2.1 Ensure invoice quantities matches packing slip quantities
3. Label the invoice with the budget code
   3.1 Write in the school code
4. Send to 360 Colborne
5. If returned in a spreadsheet
   5.1 With a contract #
      5.1.1 Give to Nan
   5.2 With a PO#
      5.2.1 Receipt invoice
      5.2.2 Put PO # and rec # on invoice
      5.2.3 Custodial Supervisor sign
6. Send to 360

RESPONSIBILITY ACTIVITY

Clerk

1. Receive and date stamp invoices.
2. Give invoices to appropriate ESG staff - Ted, Jim, Pat, Rachel, or Sam
3. Label with appropriate budget code and receipt if necessary
   3.1 If the invoice is over $1,000 and does not have a purchase order number
4. Create req in eProcurement
   4.1 In req name and description, use the word CONFIRMING
   4.2 Complete req, attach invoice and submit
5. Keep invoice in holding file until PO Dispatched
   5.1 Monitor request daily
6. Receipt invoice
7. Put PO # and rec # on invoice
8. Send to 360

RESPONSIBILITY ACTIVITY

Clerk

1. Receive and date stamp invoices
2. Match invoice with the corresponding packing slip
   2.1 Ensure invoice quantities matches packing slip quantities
   2.2 Storekeeper approves and signs parking slip
3. Label the invoice with the budget code 01-…-…-1302-…

Maintenance Supervisor

4. Confirm purchase and sign showing approval
5. Return yellow folder to the clerk by noon on Tuesday

Clerk

6. Review to ensure invoices are complete
7. Send invoices to 360

RESPONSIBILITY ACTIVITY

Management

1. Establish Cross Docking System
2. Review Cross Docking System with Storekeeper

Storekeeper

3. Receive material
4. Updates the Inventory Control System
5. Store on dock
6. Coordination…….

RESPONSIBILITY ACTIVITY

1. Acknowledge need
   - 1.1 Review job description
     - 1.1.1 Special hiring needs, i.e. RPZ Certification
   - 1.2 Review Training and Experience Exam
   - 1.3 Identify
     - 1.3.1 Position
     - 1.3.2 FTE
     - 1.3.3 Start Date
     - 1.3.4 Temp or permanent
     - 1.3.5 Budget Code
     - 1.3.6 Hiring Manager
2. Enter requisition in HRMS
3. HR will determine who is qualified for the position
4. Facilities Department uses Training & Experience Exam – this is a …….
   - 4.1 Create and send to HR
     - 4.1.1 Indicate dates to/from
   - 4.2 HR will indicate how many T&E's they received
   - 4.3 Grading by HR and other
   - 4.4 Graded – if pass (75%) is worth 70% of total score
5. Oral Exam – this is a …….
   - 5.1 All who pass T&E are given an oral exam
   - 5.2 Review oral exam questions
   - 5.3 Exams typically last 10-30min
   - 5.4 Are worth 30% of the total score
   - 5.5 HR will review rules for giving oral exams at the time
6. After exams – a pool of 3 for 1 opening or if more than 1 position open for a request, then pool is 3 of open potions plus 2 plus an ties
7. Final Interview – review interview questions
   - 7.1 Top candidates only will be interviewed

7.2 Open dialog – chance to “get to know” candidates

7.3 Tell HR who you choose

7.3.1 That candidate will be offered the position

7.3.1.1 pending background check

7.3.1.2 pending physical

7.3.2 if both passed – hired

7.3.3 if not, offer to next candidate

8. Rules – no one person can participate in all 3 steps
9. Inform HR of results
10. See Hiring SOP XXX

Best Practices for trades

T&E – HR/Foreman/Direct Maintenance Supervisor
Oral – HR/Other Maint Sup/Other admin/H&S or trade foreman
Interview – HR (maybe)/Foreman/Maint Sup

List of people will be maintained for 1 year from date of interview.

If any opening come up 6 month after interviewing – next person on list will be contacted and if

Want job	no want job
1. bg check	go to next person
2. physical	
both pass – hire	

no pass go to next person on list

If the list of interviewed and no one hired, receive the next 3 names to interview.

May consider

Get the next 3 names and re-interview and choose or not

Only keep list for 6 months then start over

RESPONSIBILITY ACTIVITY

1. Acknowledge need
    - 1.1 Review job description
        - 1.1.1 Special hiring needs, i.e. RPZ Certification
    - 1.2 Review Training and Experience Exam
    - 1.3 Identify
        - 1.3.1 Position
        - 1.3.2 FTE
        - 1.3.3 Start Date
        - 1.3.4 Temp or permanent
        - 1.3.5 Budget Code
        - 1.3.6 Hiring Manager
2. Enter requisition in HRMS
3. HR will determine who is qualified for the position
4. Establish interview questions
5. Interview candidate
    - 5.1 Can be interviewed as many times as necessary
6. Rank Candidates
7. Inform HR of results
8. See Hiring SOP XXX

The access to the building needs to be managed and controlled to maintain the safety and security of the staff. In the event of an evacuation or other such event it is necessary to know who is in our facility at all times. As such all visitors will enter and leave the building through the main entrance (West side of the building) as well as use the visitor log. In addition the ongoing control of our heating and cooling systems requires that access door be kept closed except when in use.

Responsibility **Activity**

Visitors – non SPPS employees

1. Call to schedule an appointment prior to visiting.
2. Enter the building through the West visitor entrance
3. Sign in and out at the front desk.

Visitors – SPPS employees

4. Enter the building through the main entrance.
5. Sign in at the front desk.

Building Clerk

6. Insure that all visitors' sign in and out on the visitor log.
7. It is desired that all vendors have an appointment prior to making a call on SPPS employees.
8. Issue a visitor badge to any non-district employee entering the building as deemed necessary.

All Facilities employees

9. All building exterior entry and overhead doors must be closed and locked at all times unless in use.

Each department at DSF - 1930 Como has a set number of access cards for. Facilities has cards #1-6, NS #7-16, TS #17-30. Each department clerk is responsible to monitor the visitor badges and report lost or stolen cards to SEM.

RESPONSIBILITY ACTIVITY

Department Clerk

1. District staff with an SPPS ID Card
    1.1. With Access
        1.1.1. Monitor
        1.1.2. If Abuse Lose Rights
    1.2. Non-Access
        1.2.1. Access granted on a case by case basis determined by department

2. Visitors
    2.1. Sign in/out sheet used at all main department desks
        2.1.1. Daily deliveries may not be required to sign in

3. Classes held at 1930
    3.1. If classes held in a room that requires badge access – i.e. Lab C or Blue Room
        3.1.1. Give badges to Instructor based on # of participants
        3.1.2. Students must wait Instructor to arrive before allowed into classroom
        3.1.3. Instruction or designee must monitor students
        3.1.4. No propping of doors is allowed at any time

4. Visitors - Non SPPS Employees Access
    4.1. Facilities
        4.1.1. Visitors
            4.1.1.1. Sign in
            4.1.1.2. Visitors Badge
            4.1.1.3. Badge returned
        4.1.2. Deliveries
        4.1.3. Sign in, no badge, no escort
    4.2. Technology Services
        4.2.1. Escort all
        4.2.2. No badge given
    4.3. Nutrition Services
        4.3.1. Escort all
        4.3.2. No badge given
    4.4. Mitten Makers
        4.4.1. Sign in
        4.4.2. Visitors Badge
    4.5. Guardian
        4.5.1. Sign in
        4.5.2. Visitors Badge

Storeroom Security

The access to the storeroom needs to be managed and controlled to maintain the integrity of the material stored in the area. While it is important to control access there must be flexibility in the process to allow the Trades to serve our customers on a 24/7 basis.

Responsibility **Activity**

Maintenance Supervisor

1. Establish the rules that will govern the access of the Storeroom
2. Periodically request feedback from the trade foremen as to the required access for each trade.
3. Periodically review the established rules to determine the impact of the access list on serving our customers and modify if needed.

Foreman

4. Distribute the access list and rules to their staff.
5. Input to the management team any comments dealing with the access to the storeroom.
6. The list of employees needing access must be updated and accurate.
7. Supply a copy of the updated employee list to the Department Supervisor whenever a change is needed.

Storekeeper

8. Insure that during normal business hours only approved employees are in the storeroom.
9. Insure that the pedestrian and overhead doors are closed and secure at all time they are not in use.
10. Maintain a log to be used by the trades for non-manned hour's parts transfers.
11. Enter all transactions from the log sheet into Tririga first thing on the next business day.

Tradesmen

12. When taking parts from the storeroom during closed hours enter the item number, quantity, FM number and name on pick ticket.

    Note: All material must be accounted for before leaving the storeroom
13. Leave the completed pick ticket on the storekeeper's desk.

Maintenance Supervisor

14. Distribute the approved access list containing all the necessary information for Automation to set up the security system to allow storeroom access by the necessary employees.
15. Distribute the up to date list to the storekeeper for their use.

16. Monitor the actual results of the process for optimal security and access availability.

Automation

17. Maintain Storeroom access up to date based on the direction of the Department Supervisor.

GRANT APPLICATION PROCESS

When a favorable grant opportunity is presented to the Saint Paul Public Schools Facilities Department the following procedure is to be followed in order to apply for and accept grant monies.

ACTIVITY RESPONSIBILITY

Applying

Grant Submitter

1. Before beginning the grant writing process a pre-approval form must be completed and submitted to the Grants Department
   - 1.1 Complete the "School Grant Pre-Approval Form"
   - 1.2 Form can be found on via the following link to the communications website: http://communications.spps.org/how_to_submit_a_grant
   - 1.3 Form is also located on the W Drive in the "Staff Support" folder
   - 1.4 Email the completed pre-approval form to Lisa Vandersteur, lisa.vandersteur@spps.org
2. A final draft of the written grant application and attachments (listed below) must be sent to Lisa Vandersteur at least 7 business days before the submittal deadline.

Grants Department

3. Generate a consent agenda item for the next board meeting
4. Enter grant information into PeopleSoft, this will include attaching all documents as below
   - 4.1 Sponsor's Request for Proposals and/or applications instructions
   - 4.2 SPPS pre-approval form
   - 4.3 Final Application
   - 4.4 Budget (if not included in application)
   - 4.5 Sponsor Forms (with signature)
   - 4.6 Non-standard attachments (Not 501c3 letter, audit statements or board)
   - 4.7 Any memoranda regarding the grant and/or contract agreement

Accepting

Grant Submitter

5. Send all grant award documentation via email to Rebekah Doyle, rebekah.doyle@spps.org
   - 5.1 Award letter
   - 5.2 Contract, grant agreement, GAN or OGAN
6. Schedule a meeting with Rebekah Doyle to go over the grant acceptance checklist

Grants Department

7. Review the grant documentation
8. Update PeopleSoft information to reflect a Grant Approval
9. Enter project budget into PeopleSoft and forward to business office accounting
10. Lead the grant acceptance checklist meeting

Business Office

11. Accounting - generate a project number and budget code
12. Purchasing - process award agreement, attain general counsel and superintendent approval /signature as required

Implementing and Managing

Grant Submitter

13. Implement grant as specified in the application and ward documents following all district procedures, applicable laws and funder requirements

PLACEMENT OF EMPLOYEE ON PAID ADMINISTRATIVE LEAVE CHECKLIST

1. Supervisor discusses with an HR Department administrator the day and time the administrative leave will be effective.
   1.1 Such leaves are often communicated at the end of the workday, but other options may be necessary depending upon the situation.

2. Supervisor contacts the Network Systems Administrator and copy the Director of Information Technology
   2.1 To request that the employee's District's email account and access to other online District systems (such as CAMPUS) be deactivated at a time consistent with the time you have selected to meet with the employee.
      2.1.1 Speak directly with or communicate the request via email at least 24 hours prior to the time you want the deactivation to occur Print name on packing slip
      2.1.2 Do NOT communicate this request by voice mail.

3. HR informs the Security office of the action. Contact Laurie Olson, Director. Her cell phone number is 612-990-6993.
   3.1 If you are unable to collect the person's ID badge, contact Laurie, so she can deactivate the badge.

4. HR will consider whether it is appropriate or necessary to inform our Communication Department of the action.

5. Supervisor prints the letter on letterhead and signs; then make photocopies of the signed document, including one for you.
   5.1 Individuals in HR receive a copy (HR Consultant, Labor Relations, and Performance Management).
6. Give the employee the original, signed letter in a private meeting.
   6.1 Open the letter and read it to the employee before giving it to him/her.

7. Collect the employee's ID badge, keys, laptop, district cell phone, or any other such property belonging to the District.

   7.1 At the end of your meeting with the employee, walk the employee out and see that he/she leaves, doing so in as quiet and respectful manner as possible

7.2 If necessary, place the employee's computer(s) and his/her district cell phone in a locked and secured area until further notice.

7.3 Make arrangement for coverage for the employee

8. It is generally not appropriate to provide information to others about the administrative leave.

8.1 In most instances, if it is necessary to say anything, it is best to confine your communication to stating that the employee is not at work and that you do not have information at this time regarding his/her return to work.

Glossary of Terms

Word	Definition
Parts	Items maintained in Storeroom inventory
Materials	Items purchased by Trades that are not found in the Storeroom inventory
Code Compliance	
Work Task	Previously known as a work order
Work Group	Collection of employees, i.e. planning, Plumbing etc
Blanket PO	
MN ST3	State tax exempt cert
State Contract	
eProcurement	
Asset Tag	
Expendable items	i.e. items non controlled in inventory like caulk, tape, screws etc
Project	A non maintenance task