



Maintenance Department Policies and Procedures Manual

Malcolm Thomas, Superintendent

Board Members

Jeff Bergosh	District 1
Gerald Boone	District 2
Linda Moultrie	District 3
Patricia Hightower	District 4
Bill Slayton	District 5

Revised 2017



"Making A Positive Difference"

THE SCHOOL DISTRICT OF ESCAMBIA COUNTY

215 WEST GARDEN STREET
PENSACOLA, FL 32501
PH.850/432-6121, FAX 850/469-6379
<http://www.escambia.k12.fl.us>

JIM PAUL, SUPERINTENDENT

March, 2003

I want to thank the following dedicated Maintenance Improvement Committee Members for their involvement in reviewing and revising this policies and procedures manual.

Don Willis, Supervisor, Electronics Shop
Philip Burleson, Supervisor, Electrical Shop
Bob Pilgrim, Supervisor, Northend Maintenance Shop
David Pittman, Carpenter II
Carol Stier, Administrative Secretary II
Larry Bivines, Painter I
Buddy Davis, Locksmith

Mark R. Pursell, Director
Maintenance Services

MRP/shp

REVISIONS/ADDITIONS SUMMARY

	Revision Date	Sections Affected	Revision Type*	Comments	Initials
1	2/24/03	02-01-j3	TXT REV	Re-numbered	acb
2	2/24/03	02-01-j4	TXT REV	Re-numbered	acb
3	2/24/03	03-01-k1	TXT REV	Revised	tak
4	2/28/03	03-01-e10	TXT REV	Revised SOP and attachment	tak
5	3/26/03	03-01-h2	TXT REV	Revised	wjg
6	3/26/03	03-01-k1	TXT REV	Revised	tak
7	3/27/03	03-01-e13	ADD	Policy Numbering	tak
8	3/27/03	03-01-f3	ADD	Extra Pay Instructions	tak
9	6/24/03	02-01-j3	TXT REV	Revised SOP	tak
10	7/09/03	02-01-j3	TXT REV	Revised SOP	tak
11	7/30/03	03-01-j2	TXT REV	Revised SOP and attachments	tak
12	9/9/03	02-01-j3	TXT REV	Revised SOP and attachments	tak
13	9/24/03	03-01-g3	TXT REV	Revised SOP	tak
14	5/25/04	02-Intro.	TXT REV	Revised Maintenance Org. Chart	cmp
15	5/25/04	02-Intro.	TXT REV	Revised Shop Name -Overview	cmp
16	5/25/04	02-02-a1	TXT REV	Revised Shop Name to HA	cmp
17	5/25/04	01-Intro.	TXT REV	Revised Asst. Supt. Name	cmp
18	7/14/04	02-04-c2	ADD	Added tool repair contingency	cmp
19	7/27/04	02-Intro	TXT REV	Rev. Organizational Structure	cmp
20	9/8/04	02-01-i1	TXT REV	Rev. Travel Authorization Form	cmp
21	9/8/04	02-01-i8	TXT REV	Rev. Travel Reimburse. Form	cmp
22	11/16/04	02-07-c	TXT REV	Revised SOP & Add Attachment	cmp
23	3/2/05	05-04-d3	ADD	New Policy Re: Access Control	cmp
24	3/14/05	02-04-d2	TXT REV	Attach. #2-verbose for key costs	cmp
25	3/14/05	02-04-b1	TXT REV	Change total for PO Issuance	cmp
26	3/14/05	02-04-b3	TXT REV	Change to Heating & Air Shop	cmp
27	8/11/05	02-01-g1	TXT REV	Change PO Limit Amount	cmp
28	8/11/05	02-Intro.	TXT REV	Revised Maintenance Org. Chart	cmp
29	8/11/05	02-07-a	TXT REV	Changed Shops to HA Shop	cmp
30	8/11/05	02-08-a	TXT REV	Changed Shops to HA Shop	cmp
31	10/5/05	02-04-b1	TXT REV	Change PO Limit Amounts	cmp
32	10/5/05	02-01-g1	TXT REV	Change PO Limit Amounts	cmp
33	11/10/05	02-Intro.	TXT REV	Revised Maintenance Org. Chart	cmp
34	11/10/05	02-07-c	TXT REV	Attachment #1-Duty Guidelines	cmp
35	8/17/06	02-Intro	TXT REV	Revised Maintenance Org. Chart	cmp

*Revision Type

- ADD: Complete addition of new SOP
- DEL: Complete deletion of existing SOP
- TXT REV: Revision of text of an existing SOP

Continued

REVISIONS/ADDITIONS SUMMARY

	Revision Date	Sections Affected	Revision Type*	Comments	Initials
36	8/17/06	02-Intro	TXT REV	Rev. District Mission Statement	cmp
37	8/17/06	02-Intro	TXT REV	Rev. Maint. Dept. Overview	cmp
38	8/17/06	02-02-a1	TXT REV	Rev. Shop Names	cmp
39	8/17/06	02-02-a2	TXT REV	Correct Typographical Error	cmp
40	8/22/06	02-04-e3	TXT REV	Rev. Policy & Add Job Descriptions	cmp
41	8/22/06	02-04	TXT REV	Rev. Table of Contents	cmp
42	9/5/06	02-08	TXT REV	Change Section 8 Title	cmp
43	9/5/06	02-08	TXT REV	Revised Table of Contents	cmp
44	9/5/06	02-08-a	TXT REV	Revised Section Title	cmp
45	9/5/06	06-08-b	ADD	SOP Fire Alarm Monitoring	cmp
46	9/12/06	02-04-b3	TXT REV	Rev. Shop Names	cmp
47	1/18/07	Title Page	TXT REV	Change to newly elected Board	cmp
48	1/18/07	Main TOC	TXT REV	Add SOP-Fire Alarm Systems	cmp
49	1/18/07	02-Intro	TXT REV	Rev. Dept. Mission, Vision, Aim	cmp
50	1/18/07	02-TOC	TXT REV	Add SOP-Fire Alarm Systems	cmp
51	1/18/07	07-02-c1	ADD	SOP-Fire Alarm Systems	cmp
52	3/7/07	04-TOC	TXT REV	Maintenance Manager – Grounds	cmp
53	3/7/07	05-04-d3	TXT REV	Revised Policy & Attachment #1	cmp
54	3/7/07	05-04-e3	ADD	Maintenance Manager -Grounds	cmp
56	3/7/07	02-Intro	TXT REV	Maintenance Organizational Chart	cmp
57	8/7/07	02-Intro	TXT REV	Maintenance Organizational Chart	cmp
58	7/19/07	02-06-a	TXT REV	Revise Process	cmp
59	8/7/07	02-06-b	TXT REV	Revise Process	cmp
60	8/7/07	02-06-b	TXT REV	Revise Attachment #2	cmp
61	8/7/07	02-06-c	TXT REV	Revise Process	cmp
62	8/7/07	02-06-c	TXT REV	Revise Attachment #1	cmp
63	8/7/07	06-08-b	TXT REV	Contact Info Revision	cmp
64	8/13/07	07-04-d4	ADD	Add SOP – Window AC Units	cmp
65	8/13/07	04-TOC	ADD	Table of Contents-Add New Policy	cmp
66	9/17/07	02-01-j3	TXT REV	Interview SOP & Attachments	sed
67	10/3/07	07-02-d4	ADD	SOP-Surplus Technology Disposal	cmp
68	10/15/07	07-02-d1	ADD	SOP-Surplus Procedures & Attach.	cmp
69	10/15/07	07-02-d2	ADD	SOP–Customer Surplus Guidelines	cmp
70	10/15/07	07-02-d3	ADD	SOP-Auction Responsibilities	cmp
71	10/19/07	07-02-d5	ADD	SOP-Moving Services and Options	cmp

*Revision Type

- ADD: Complete addition of new SOP
- DEL: Complete deletion of existing SOP
- TXT REV: Revision of text of an existing SOP

Standard Operating Procedure: **Revisions/Additions to Policies and Procedures**

REVISIONS/ADDITIONS SUMMARY

	Revision Date	Sections Affected	Revision Type*	Comments	Initials
72	10/24/07	02-TOC	ADD	Add Surplus Operations SOP's	cmp
73	11/26/07	02-03-b	REV	Revised SOP	cmp
74	11/26/07	03-TOC	REV	Add SOP 07-07-e	cmp
75	11/26/07	07-07-e	ADD	Add SOP re Radio Usage	cmp
76	1/23/08	02-01-h2	REV	Revised SOP	sed
77	2/4/08	07-02-d1	REV	Revised SOP	cmp
78	2/4/08	07-02-d2	REV	Revised SOP	cmp
79	2/4/08	07-02-d3	REV	Revised SOP	cmp
80	2/4/08	07-02-d4	REV	Revise SOP	cmp
81	2/4/08	02-02-a1	REV	Revise to Add Surplus Ops	cmp
82	3/28/08	02	REV	Maintenance Overview	cmp
83	1/21/10		REV	Main Title Page	cmp
84	1/21/10		REV	Main Table of Contents	cmp
85	1/21/10	Operations Introduction	REV	From the Assistant Supt. of Operations	sed
86	1/21/10	Operations Introduction	REV	Operations Division Guiding Principles/Mission Statement	sed
87	1/21/10	Operations Introduction	REV	Operations & Maintenance Organizational Charts	sed
88	1/21/10	01	REV	Section 1 Title Page	
89	1/21/10	01	REV	Section 1 Table of Contents	sed
90	1/21/10	02-01-e7	REV	Revised SOP & Attachment	sed
91	1/21/10	02-01-e8	REV	Revised SOP(delete Att. #1)	sed
92	1/21/10	08-01-e14	ADD	Add SOP & Attachment	sed
93	1/21/10	08-01-e15	ADD	Add SOP & Attachment	sed
94	1/21/10	02-01-j3	REV	Revised Attachment #3a	cmp
95	1/21/10	02-01-j3	REV	Revised Attachment #4	cmp
96	1/21/10	03-01-k1	DEL	Delete SOP	sed
97	1/21/10	03-01-l1	DEL	Delete SOP	sed
98	1/21/10	02-Introduction	REV	Revised Maintenance Org. Chart	cmp
99	1/21/10	03	REV	Revised Table of Contents	cmp
100	1/21/10	02-03-b	REV	Revised SOP (delete Att. #1)	cmp
101	1/21/10	05-04-d3	REV	Revised Attachment #1	cmp
102	1/21/10	05-04-d3	REV	Revised Attachment #5	cmp
103	1/21/10	02-04-e3	REV – Shop Copy Only	Replace Maintenance Manager-Grounds Job Description with Maintenance Grounds Supervisor	cmp

*Revision Type

- ADD: Complete addition of new SOP
- DEL: Complete deletion of existing SOP
- TXT REV: Revision of text of an existing SOP

Standard Operating Procedure: **Revisions/Additions to Policies and Procedures**

REVISIONS/ADDITIONS SUMMARY

	Revision Date	Sections Affected	Revision Type*	Comments	Initials
104	11/1/10	Main TOC	REV	Revised Main Table of Contents	cmp
105	11/1/10	Section 2	REV	REVISED ORG CHART	cmp
106	11/1/10	02-02-a7	TXT REV	Revised SOP	cmp
107	11/1/10	02-07-c	TXT REV	Revised SOP & Attachment #1	cmp
108	11/1/10	Section 8	REV	Revised Table of Contents	cmp
109	11/1/10	10-08-c	ADD	Add New SOP & Attachment #1	cmp
110	10/1/10	02-01-e7	REV	Revised SOP	cmp
111	10/1/10	08-01-e14	REV	Revised Attachment #1	cmp
112	10/1/10	05-04-d3	REV	Revised Attachment #1	cmp
113	5/10/11	02-04-e3	REV	Revised Attachment #'s 1 thru 49 Job Descriptions (Shop & Master Copies Only)	cmp
114	09/09/11	02-04-b3	REV	Add Shop Cost Center	cmp
115	09/09/11	02-02-a1	REV	Delete Shop	cmp
116	04/11/12	12-01-d10	ADD	New Policy re: JLA Line of Sight	sed
117	04/10/15	02-02-a2	TXT REV	Revise request system & attachments	cmp
118	04/10/15	02-02-a4	TXT REV	Revise request system	cmp
119	04/10/15	02-02-a5	TXT REV	Revise request system & attachments 1, 2 & 3	cmp
120	04/10/15	02-02-a6	TXT REV	Revise request system & attachment	cmp
121	04/10/15	02-02-a8	DEL	Delete SOP System no longer in use	cmp
122	06/09/15	02-02-a1	TXT REV	Revised to include new system.	cmp
123	06/09/15	02-04-b1	TXT REV	Revised to include new P-Cards.	cmp
124	06/09/15	02-04-b3	TXT REV	Revised to delete report types.	cmp
125	08/05/15	02-04-b4	TXT REV	Revised policy & attachment #1 to delete reference to use of CPO's	cmp
126	03/23/16	02-03-b	TXT REV	Revised policy to include new cell phone usage requirement.	cmp
127	04/06/16	02-01-e4	TXT REV	Revised policy to include requirement of School District policy for employee to return to work.	cmp
128	08/03/16	02-01-e4	TXT REV	Revised policy to include requirement to have court form time stamped after being released.	cmp
129	01/13/17	02-04-b1	TXT REV	Revised purchasing limit amounts.	cmp
130	02/03/17	02-04-b2	TXT REV	Revised to clarify quotes for contracted services.	cmp
131	09/18/18	02-07-c	TXT REV	Changed phone number	glg
132	12/06/18	02-04-b1	TXT REV	Revised purchasing limit amounts and quote procedures.	glg

*Revision Type

- ADD: Complete addition of new SOP
- DEL: Complete deletion of existing SOP
- TXT REV: Revision of text of an existing SOP

Standard Operating Procedure: **Revisions/Additions to Policies and Procedures**

REVISIONS/ADDITIONS SUMMARY

	Revision Date	Sections Affected	Revision Type*	Comments	Initials
133	01/18/19	Main TOC	TXT REV	Revised Main Table of Contents	glg
134	01/18/19	Section 3	TXT REV	REVISED TOC	glg
135	01/18/19	02-03-a 02-03-a1	TXT REV	Changed 02-03-a to 02-03-a1 and added contingency	glg
136	01/18/19	02-03-a2	ADD	Add Uniforms SOP	glg
137	01/18/19	02-07-c	TXT REV	Added language for Uniforms	glg
138	01/18/19	02-07-c Attachment #1	TXT REV	Added language for Uniforms	glg
139					
140					
141					
142					
143					
144					
145					
146					
147					
148					
149					
150					
151					
152					
153					
154					
155					
156					
157					
158					
159					
160					
161					

*Revision Type

- ADD: Complete addition of new SOP
- DEL: Complete deletion of existing SOP
- TXT REV: Revision of text of an existing SOP



***MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL***

Table of Contents

Operations Introduction

Section 1: Operations Division Standards

- a. On-the-job Injury/Accident
- b. District Vehicles
- c. General Employee Requirements
- d. Regulations, Rules and Laws
- e. Administration
- f. Payroll
- g. Purchasing
- h. Property Control and Accounting
- i. Travel
- j. Human Resources
- k. Project Management –Continuous Improvement

Section 2: Maintenance Operations

- Introduction
- a. Requests for Maintenance Services
 - b. Working Hours
 - c. Systems Operation

Section 3: General Employee Requirements

- a. Dress Code / Uniforms
- b. Radio Usage
- c. Reporting to School Office

Section 4: Administration

- a. General Leave Provisions
- b. Purchasing
- c. Tools and Equipment
- d. Property Control and Accounting
- e. Human Resources



***MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL***

Table of Contents - continued

Section 5: Employee Safety

- a. Employee Safety
- b. Annual Training
- c. Safety Awareness Program

Section 6: Construction Projects

- a. Substantial Completion
- b. Project Warranty
- c. Post Occupancy

Section 7: Disaster and Emergency

- a. Declared State of Emergency
- b. Bomb Threat
- c. Nights & Weekend Emergency
- d. Hurricane/Tropical Storm

Section 8: Permits, Inspections and Code Compliance

- a. Maintenance Permits and Inspections
- b. Fire Alarm Off-Site Monitoring
- c. Generator Operation and Maintenance Procedures



Escambia County
School District
Escambia County Florida



Maintenance Services Department
Policies and Procedures Manual

Operations
Division
Introduction



THE SCHOOL DISTRICT OF ESCAMBIA COUNTY

30 EAST TEXAR DRIVE
PENSACOLA, FL 32503
PH.850/469-5586, FAX 850/469-5548
<http://www.escambia.k12.fl.us>

MALCOLM THOMAS, SUPERINTENDENT

Dear Operations Division Team Member,

This policies and procedures handbook is intended to provide a comprehensive set of procedures to guide our work as a Division. We have collaboratively worked to make this document as complete as possible. While this manual is intended to be comprehensive, it is important to note that this document is not intended to repeat all items found in Board policy or Florida Statutes.

In order for us to make this a viable document, we must constantly update this manual as we move forward in the spirit of continuous improvement. Please endeavor to maintain this document as revisions and additions are published. In addition, this manual can be found on each department's website.

Thank you for your assistance in creating this document. I look forward to continuing to work together as we move our division forward.

If you have questions or suggestions regarding this handbook, please do not hesitate to contact me.

Sincerely,

Shawn Dennis
Assistant Superintendent – Operations

OPERATIONS DIVISION GUIDING PRINCIPLES AND MISSION STATEMENT

Students are the focus of everything we do. We believe all students deserve the best possible environment to maximize their learning opportunities.

- We provide efficient and effective services to insure a quality learning environment
- We encourage and welcome stakeholder participation in our everyday decision making processes
- We strive constantly to achieve a customer service rating unparalleled by other District Operations Divisions
- We strive to be good stewards of taxpayer money cautious never to sacrifice quality for cost
- We place the needs of our employee families first above all other aspects of our work life – “Family First!”

Our decisions and actions are guided by our Core Values.

- Honesty
- Integrity
- Respect
- Responsibility
- Accountability

We believe that every individual dedicated to improving the quality of life in our community is essential and plays a vital part in the education of our students. We accomplish this through:

- Community empowerment
- Effective communications
- Sharing decision making
- Recognizing and celebrating successes
- Assuring a safe and supportive environment

We will continue to improve the quality of our public education system by continual assessment, maintenance of our effective programs, and a willingness to seek change in response to the needs of our students.

OPERATIONS DIVISION MISSION:

The mission of the Operations Division is to provide operational over-site and administrative support for all School District education support departments so that they may, in collaboration with all stakeholders, continuously strive to meet every child's educational needs by providing a safe, effective and efficient learning and working environment.

Department Mission Statements:

MAINTENANCE & CUSTODIAL SERVICES:

The mission of the Maintenance Services Department is to provide a clean, safe and comfortable environment to support the District's Mission, Vision, and Aims.

FACILITIES PLANNING:

The mission of Facilities Planning is to improve the quality of educational facilities through a continuing process of professional planning, the effective use of technology and communication with our customers/stakeholders, in alignment with District's Aims and Goals.

TRANSPORTATION:

This mission of the Transportation Department is to provide safe, dependable, and efficient transportation in support of the District's Aims.

ENERGY MANAGEMENT:

The mission of the Energy Management Department is to create a people-oriented energy savings plan that optimizes necessary energy use and minimizes waste.

PROTECTION SERVICES:

The mission of the Security, Safety and Emergency Operations Department is to promote and maintain a secure, safe, and healthful environment in which the District's educational mission can be successful.

WAREHOUSE AND INVENTORY SERVICES:

The mission of the Warehouse and Inventory Services Department is to provide all customers economical and efficiently delivered goods for use in support of the education process.

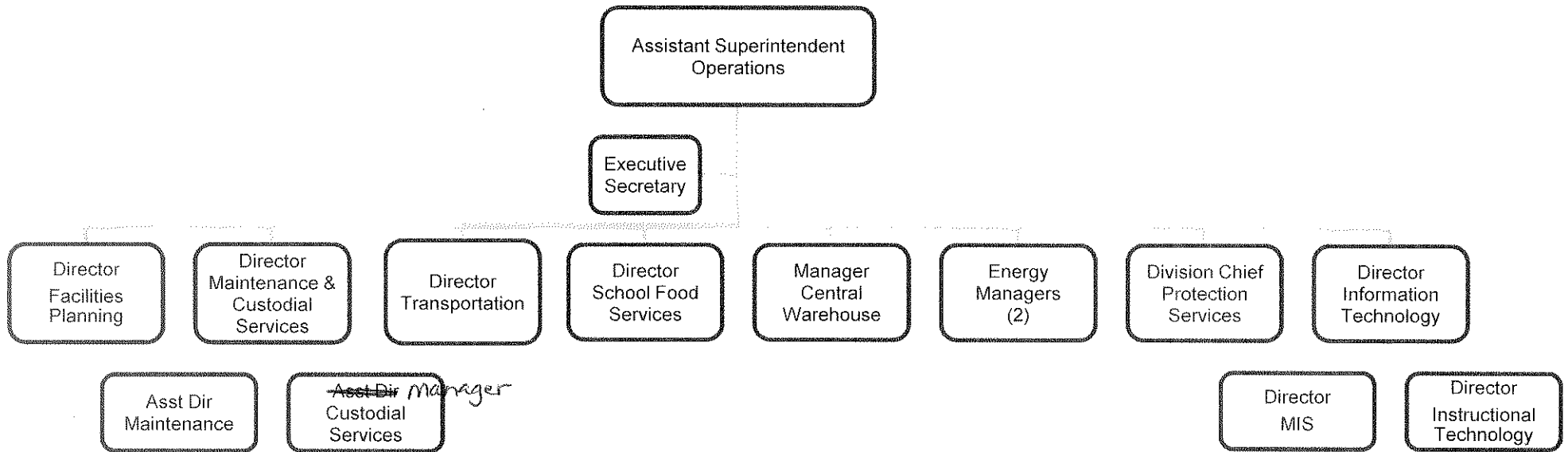
SCHOOL FOOD SERVICES:

The mission of the School Food Services Department is to provide student and adult customers a nutritionally sound and cost efficient food service program that is sensitive to student preferences and compliant with all applicable public laws and accepted child feeding standards.

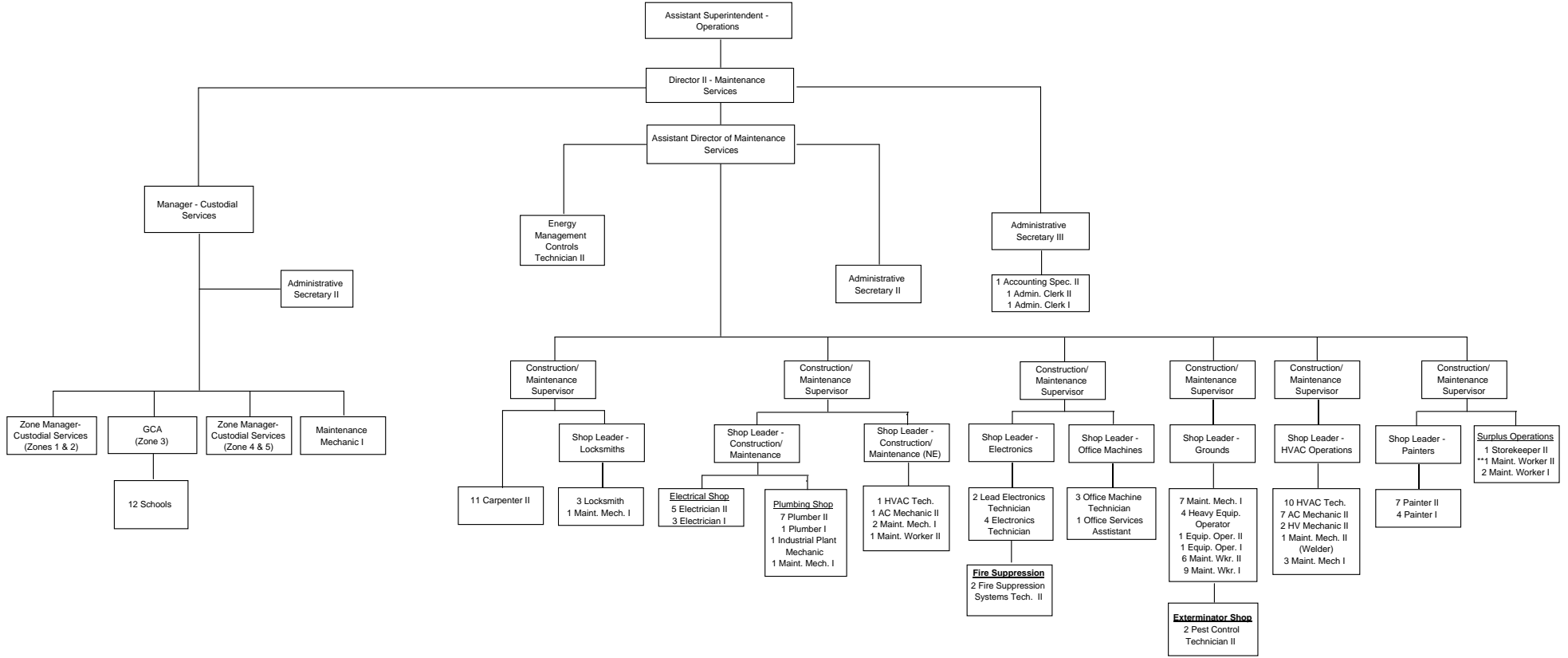
INFORMATION TECHNOLOGY:

It is the mission of the Information Technology Department to administer and maintain all of the varied technology systems and services and constantly improve and implement new systems in support of the District's mission.

OPERATIONS



Maintenance & Custodial Departments Organizational Chart



**Surplus Ops - Michael Hall is a Maintenance Worker II from Grounds on permanent light duty



Escambia County
School District

Escambia County Florida



Maintenance Services Department
Policies and Procedures Manual

Section 1
Operations
Policies and
Procedures



***MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL***

TABLE OF CONTENTS

SECTION 1: Operations Policies and Procedures

- a. On-the-job Injury/Accident
 - 1. Workers' Compensation
Attachment #1 – Workers' Comp Provider List (Facilities)
 - 2. Injury/Accident Reporting
Attachment #1 – Supervisor's Accident Analysis/Injury Report
- b. District Vehicles
 - 1. Driver Responsibilities
Attachment #1 – Driver Responsibilities Acknowledgement Form
 - 2. CDL Disqualifying Offenses
- c. General Employee Requirements
 - 1. Employee Identification
 - 2. Conduct Off The Job
- d. Regulations, Rules and Laws
 - 1. General
 - 2. Florida's Clean Indoor Air Law
 - 3. Usage of Smokeless Tobacco Products
 - 4. Florida's Right to Know Law
 - 5. Drug-Free Workplace
Attachment #1 – Over-the-Counter Drugs(Affecting Test Results)
Attachment #2 – Challenges to Test Results
Attachment #3 – List of Drugs Employer Will Test For



***MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL***

SECTION 1

TABLE OF CONTENTS – continued

- d. Regulations, Rules and Laws - continued
 - 6. Zero Tolerance Policy for Crime and Substance Abuse
 - 7. Fraternalizing with Students
 - 8. Conflict of Interest Policy
 - 9. Disclosure of Dual Employment or Contractual Relationship
Attachment #1 – Disclosure of Dual Employment Form
 - 10. JLA Line-of-Sight for One Time Vendor Services
Attachment #1 – One Time Vendor Line-of-Sight Notification Form
- e. Administration
 - 1. Annual Leave
 - 2. Sick Leave
 - 3. Personal Leave
 - 4. Jury Duty
 - 5. Absence Without Leave
 - 6. Compensatory Time
Attachment #1 – Compensatory Time Report Form
Attachment #2 – Compensatory Time Usage Request
 - 7. Monthly School Board Agenda
Attachment #1 – Executive Summary for Board Agenda
 - 8. Leadership Team Agenda
Attachments #2-#5 – Communication/Deployment Flowchart
 - 9. Revisions/Additions to Policies and Procedures
Attachment #1 – Revisions/Additions Summary Form



***MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL***

SECTION 1

TABLE OF CONTENTS – continued

e. Administration - continued

10. School Board Member Request for Information Protocol

Attachment #1 – Request for Information Protocol Flowchart

11. Record Retention

12. Open Government

Attachment #1 – Government-in-the-Sunshine Manual

13. Policy Numbering

14. Cellular Telephone/Radio Issuance

Attachment #1 – Request for Wireless Device Service Form

15. Cellular Telephone/Radio Personal Use Billing Reconciliation and
District Reimbursement

Attachment #1 – Cell Phone Reimbursement Form

f. Payroll

1. Leave Requests

Attachment #1 – Leave Request Form

Attachment #2 – Temporary Leave Request Form

2. Payroll Post (TERMS) (OFFICE COPY ONLY).

3. Extra Pay Instructions

Attachment #1 – SAP 201 & 202



MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL

SECTION 1

TABLE OF CONTENTS – continued

- g. Purchasing
 - 1. DBS Purchasing System (OFFICE COPY ONLY)
 - 2. Warehouse Requisitions (OFFICE COPY ONLY)
 - 3. Software Acquisition
- h. Property Control and Accounting
 - 1. General
 - 2. Surplus Property (Non-Vehicle)
 - Attachments #1-#4 – Sample Equipment Disposal/Transfer*
- i. Travel
 - 1. Travel Authorization
 - Attachment #1 – Travel Authorization Request Form*
 - 2. Official Headquarters
 - 3. Computation of Travel for Reimbursement
 - 4. Rates of Per Diem and Subsistence Allowance
 - 5. Transportation
 - 6. Incidental Expenses
 - 7. Fraudulent Claims
 - 8. Travel Reimbursement Vouchers
 - Attachment #1 – Travel Reimbursement Claim Form*
 - Attachment #2 – In-County Mileage Reimbursement Request*



MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL

SECTION 1
TABLE OF CONTENTS – continued

- j. Human Resources
 - 1. Employee Assistance Program
 - 2. Conduct and Disciplinary Action
 - Attachment A – Request for Counseling Memorandum*
 - Attachment B – Counseling Session Summary*
 - Attachment C – Disciplinary Action Consideration*
 - Attachment D – Requirements of an Official Written Reprimand*
 - Attachment E – Notice of Proposed Disciplinary Action*
 - 3. Position Vacancy Interview
 - Attachment #1 – Interview Checklist*
 - Attachment #2 – Interview Score Sheet*
 - Attachment #3 – Applicant Tally Sheet*
 - Attachment #3a – Interviewer Individual Tally Sheet*
 - Attachment #4 – Master Contract Language (Postings, Promotions, Transfers, Reduction and Recall)*
 - Attachment #5 – Educational Support Personnel Checklist (Internal Job Postings Permanent Employees ONLY)*
 - Attachment #6 – Educational Support Personnel Checklist (Applicants NOT Currently Permanent Employees)*
 - Attachment #7 – Interview Letter*



MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL

SECTION 1

TABLE OF CONTENTS – continued

j. Human Resources - continued

4. Discipline Log

Attachment #1 – Discipline Spreadsheet

k. Project Management – Continuous Improvement

Standard Operating Procedure: **On-the-Job Injury/Accident**

Department: **Operations Division**
SOP #: **02-01-a1**

Author: MRP
Issue Date: 06/01/95
Rev. Date: 12/13/02

I. Procedure Name: **Workers' Compensation**

II. Basic Procedure:

1. Managed Care Arrangement for Workers' Compensation – The School District of Escambia County has a managed care arrangement for the treatment of job-related injuries or illnesses. The managed care arrangement is known as **CORCARE PROVIDER NETWORK**.
2. **Employees' Responsibilities for Job-Related Injuries:**
If you are hurt, on the job, you are to tell your supervisor immediately. You or your supervisor is to call **CORCARE AT 1-866-494-6631 (toll free) or 850-494-6631 (local)** for treatment authorization.
3. If you require medical treatment other than on an emergency basis, your care will be provided at one of the centers listed on the attached provider list. A CorCare Network Physician (or other health care provider) will be assigned for you to see. This provider will become your primary care physician and will provide the necessary and appropriate treatment for your work related injury. A CorVel nurse will be assigned to interact with you, your provider and employer. (See Attachment #1)

III. Contingencies/Variations:

1. For an **emergency**, proceed to the nearest hospital.
2. When the employee's condition is stabilized, **CORCARE** is to be contacted for further direction.

Standard Operating Procedure: **On-the-Job Injury/Accident**

PROVIDER		
Sacred Heart Family Care Center 6665 Pensacola Boulevard Pensacola, Florida 32505 850/416-2000 fax: 850/416-2086 Contact: Linda Durden	West Florida Immediate Care 8333 North Davis Highway Pensacola, Florida 32514 850/494-6185 Contact: WorkNet 850/494-6085 fax: 850/494-6026	Pine Forest Medical Center 7458 Pine Forest Road Pensacola, Florida 32514 850/474-8773 WorkNet **NOT WALK IN**
Sacred Heart Family Care Center 4313 Old Spanish Trail Pensacola, Florida 32504 850/432-3225	West Florida 4601 Spanish Trail Pensacola, Florida 32504 850/474-8478 Contact: WorkNet 850/494-6085 fax: 850/494-6026	West Pensacola Medical Center 321 South Fairfield Drive Pensacola, Florida 32514 850/675-4540 Contact: WorkNet 850/494-6085 fax: 850/494-6026
Sacred Heart Hospital 5151 North 9 th Avenue Pensacola, Florida 32504 850/416-7000	Baptist Occupational Medicine Dr. Craig Collier 9400 University Parkway Pensacola, Florida 32514 850/208-6400 fax: 850/478-3336	West Florida Regional Medical Center 8383 North Davis Highway Pensacola, Florida 32514 850/494-4000 Contact: Mary Bishop 850/494-6185
Fairfield Family Medicine Center Ricky Bellard, MD 4805 West Fairfield Drive Pensacola, Florida 32506 850/478-4359	Rapid Net (Drug Testing) Yvonne Williams & Jessica Frost Miami, Florida 888-577-2743 305/751-7321	West Florida Medical Cantonment, Florida WorkNet
Baptist Health Care Bascom C. Raney, MD 8401 N. Century Boulevard Century, Florida 32535 850/256-5314	Baptist Hospital 1000 West Moreno Street Pensacola, Florida 32501 850/434-4011	For additional information regarding your Worker's Comp Claim call: CorVel @ 850/494- 6644 or Risk Management @ 850/469-6159

**Attachment #1
02-01-a1**

Standard Operating Procedure: **On-the-Job Injury/Accident**

Author: MRP

Department: **Operations Division**

Issue Date: 06/01/95

SOP #: **02-01-a2**

Rev. Date: 12/13/02

I. Procedure Name: **Injury/Accident Reporting**

II. Basic Procedure:

1. In the event of injury or accident, the appropriate supervisor should be notified immediately.
2. Upon notification of an injury or accident the supervisor is responsible for completing the Supervisor's Accident Analysis/Injury Report (Attachment #1) and forwarding the completed form to the Maintenance Office.

III. Contingencies/Variations:

None

Standard Operating Procedure: **On-the-Job Injury/Accident**

THE SCHOOL DISTRICT OF ESCAMBIA COUNTY Risk Management 215 W. Garden Street • PO Box 1470 Phone: 432-6121 Ext. 4550					SUPERVISOR'S ACCIDENT ANALYSIS / INJURY REPORT						
INSTRUCTIONS: Prepare this report in duplicate. The original must be sent to Risk Management within 24 hours after accident occurs. Retain duplicate for your records. Answer all items. If medical attention is required, an authorized copy of Form 1976 RMD-2 must be attached. Report return to work, additional lost time after return to work, or any other pertinent information on Supplemental Injury Report Form.											
INJURED EMPLOYEE											
1. Name (First)			(Middle)			(Last)			2. Social Security Number		
3. Home Address (No. and Street)						(City or Town)		(State)	(Zip)		
5. Age		6. Sex	7. Race	8. Marital Status	9. No. of Dependents		10. Occupation		11. Department		
12. School or Center				13. Supervisor			14. How long employed		15. Reg. full-time employee (eligible sick leave or vacation) YES NO		
16. Hrs. Wkd. Daily		17. Hrs. Wkd. Weekly		18. Days. Wkd. Weekly		19. Wages-Hourly	20. Wages-Daily		21. Last Date Wkd.		
22. Has Employee Ret. to Work? YES NO DATE		23. Leave Form Submitted: 1/2 Day Full-Day No		24. Name & Address of Phy. Performing Initial Treatment							
25. If Hospitalized, Name & Address of Hosp.						26. Witness (Name)		(Occupation)	(Phone)		
27. Date of Accident		28. Time a.m. p.m.		29. Hrs. Wkd. This Invt. Before Acc.		30. Accident Location					
31. NATURE OF INJURY (circle) 1. Abrasion 2. Amputation 3. Contusion 4. Dermatitis 5. Dislocation 6. Foreign Body 7. Fracture 8. Infection 9. Laceration 10. Puncture 11. Sprain, Strain 12. _____			32. PART OF BODY INJURED (circle) 1. Hands 2. Arms, Wrists 3. Head, Face 4. Eyes 5. Trunk (abdominal, shoulders, ribs, groin, hips) 6. Back, Neck 7. Legs (knees, thigh) 8. Feet, Ankles (shin) 9. Internal Organ 10. Entire body (or veridus parts) 11. _____			33. ACCIDENT AGENCY —That which was most closely associated with injury: (circle) 1. Animals, insects, etc. 2. Vehicle 3. Chemicals (fumes, vapors) 4. Dust (asbestos, silica, etc.) 5. Electrical apparatus 6. Working surfaces 7. Hand tools 8. Machines, Pumps, Mowers 9. Cafeteria equipment 10. Classroom equipment 11. Athletics 12. _____			34. ACCIDENT TYPE —How injured: (circle) 1. Slip or fall 2. Handling materials/persons 3. Vehicle 4. Caught between, struck by or against 5. Tools or machinery 6. Athletics 7. Falling, flying objects 8. Stepping on or into 9. Occupational disease 10. Over-exposure, temperature 11. _____		
35. UNSAFE CONDITION —Physical cause of accident (circle) 1. Defective conditions 2. Hazardous arrangement / procedure 3. Improperly guarded 4. Improper illumination 5. Improper ventilation 6. Unsafe design / construction 7. Unsafe dress or apparel 8. No unsafe condition				36. UNSAFE PERSONAL FACTOR —Accident subcauses (circle) 1. Bodily defects 2. Improper attitude 3. Lack of knowledge or skill 4. No unsafe personal factor 5. _____			37. UNSAFE ACT —Personal cause of accident (circle) 1. Distracting, Teasing, Abusing 2. Failure to use safe attire 3. Making safety devices inoperative 4. Operating without authority 5. Operating or working at unsafe speed 6. Taking unsafe position or posture 7. Using unsafe equipment 8. Unsafe loading, Mixing, Placing 9. Working on moving or dangerous equipment 10. No unsafe act 11. _____				
38. BRIEF DESCRIPTION OF ACCIDENT _____ _____ _____											
39. WHAT ACTION HAS BEEN TAKEN TO PREVENT SIMILAR ACCIDENTS? _____ _____ _____											
40. SIGNATURES _____ _____ _____ _____											
9200-RMT-014 Revised: 12 Jun 89 Retention: 3 Years											

**Attachment #1
02-01-a2**

I. Procedure Name: **Driver Responsibilities**

II. Basic Procedure:

Any employee of the School District of Escambia County who drives a district owned vehicle as part of his/her job duties must accept responsibility for the safe and efficient operation of the vehicle. Drivers must exercise good common sense and treat county vehicles with care and respect. Abuse of county vehicles will not be tolerated. It is the responsibility of each employee who is assigned and operating a vehicle to obey all traffic laws and regulations and all District Rules. Each employee assigned to drive a school district vehicle must read Driver Responsibilities: Non-School Bus and sign the employee verification form. This employee verification form will also be made a part of the New Employee Checklist.

Vehicle Maintenance

It is the responsibility of the employee who is assigned and operating a School District vehicle to schedule with the Transportation Department all routine maintenance for the vehicle every three months or 3,000 miles. Employees are expected to advise the garage of any malfunctions or safety deficiencies known to exist with the vehicle. It is the responsibility of the employee assigned a vehicle to see that the vehicle is washed regularly or when needed. The interior of the vehicle is to be cleaned regularly.

It is the employee's responsibility to check the oil and water each time a vehicle is fueled.

Vehicular Accident

In the event an employee is involved in a vehicular accident while operating a School District vehicle, he/she is to notify the Transportation Department and/or the respective department immediately. If the employee that is involved in the accident with a School Board vehicle is found to be at fault by the officer investigating the accident, it is the employee's responsibility to pay all fines levied against him. Only the appropriate supervisor shall administer discipline of any type. All discipline shall be progressive, fair, and only for just cause. Discipline shall include, but not be limited to, conference, verbal reprimand, written reprimand, suspension and dismissal.

School District vehicles are to be used only in carrying out your duties and responsibilities for the School District and not for personal use. **continued...**

- I. Procedure Name: **Driver Responsibilities**
- II. Basic Procedure: continued

Employees of the School District who operate vehicles 26,000 pounds or heavier are required to possess a valid CDL. Employees driving a School District vehicle are expected to drive defensively and to be courteous and considerate of all other vehicular traffic at all times. (See Attachment #1)

Seatbelt Policy

Drivers and passengers of all vehicles on School Board property, on School Board business, or participating in school-sponsored activities shall wear seat belts at all times the vehicle is in motion. Violation of this policy could result in loss of driving privileges on School Board property.

- III. Contingencies/Variations:
None

THE SCHOOL DISTRICT OF ESCAMBIA COUNTY

DRIVER RESPONSIBILITIES: NON-SCHOOL BUS

Rule 6Gx17-6.07(7)

Any employee of the School District of Escambia County who drives a district owned vehicle as part of his/her job duties must accept responsibility for the safe and efficient operation of the vehicle. Drivers must exercise good common sense and treat county vehicles with care and respect. Abuse of county vehicles will not be tolerated. Listed below are specific duties and operating guidelines that must be followed. Failure to do so could affect the employee's job evaluation and/or employment.

Each employee assigned to drive a school district vehicle must:

- (a) Maintain a valid driver's license of the type required by the vehicle to be operated.
- (b) Be knowledgeable of and adhere to all state laws, School Board regulations, and department policies regarding the operations of the vehicle.
- (c) Drive only when in the proper physical and mental condition to safely operate the vehicle.
- (d) Use the vehicle only in the performance of job related duties. Keep current all required logs and/or reports.
- (e) Keep inside of vehicle clean, orderly, and free from trash and debris.
- (f) See that all vehicle fluid levels are adequate (gas, oil, water).
- (g) Take vehicle to the appropriate service shop for regularly scheduled maintenance. Check vehicle sticker for due date.
- (h) Promptly report all vehicle malfunctions to the proper service shop. No vehicle should be operated if it is in such a condition as to be unsafe to the driver, passengers, or other motorist or pedestrians, or if a malfunction might cause damage to the vehicle.
- (i) Any traffic ticket received while operating a county vehicle must be reported within eight working hours to the appropriate supervisor.
- (j) Any accident that happens off School Board property, involving School Board vehicle or property, must be investigated by the appropriate police agency and a staff person. The driver must notify his supervisor as soon as possible but no later than eight working hours after any accident and complete an accident report in the district transportation office.
- (k) The driver is required to wear a seat belt and also shall see to it that all passengers in the front seat will also wear seat belts.

Employee Verification:

I have read, understand, and will adhere to the duties and guidelines stated above.

Employee's Signature	Date	Supervisor's Signature	Date
----------------------	------	------------------------	------

9600-TRA-051 (1/87)

**Attachment #1
02-01-b1**

I. Procedure Name: CDL Disqualifying Offenses

II. Basic Procedure:

Florida statute 322.61 specifies the disqualifying offenses for holders of Commercial Driver's Licenses. Employees who hold a Commercial Drivers License who commit a disqualifying offense as described below shall be subject to disciplinary action which may include suspension and/or termination.

2 violations in a period of 3 years

- Violation of Chapter 316 in connection with a crash causing death or personal injury
- Reckless driving
- Careless driving
- Fleeing police
- Speed 15+ over
- Improper lane change
- Following too close
- Driving improperly insured CMV

One time violation

- DUI
- Refuse BAC test
- Leaving the scene of a crash, applicable sections of Chapter 316
- BAC .04+ (not DUI)
- Use of CMV in felony
- Use of CMV while possessing controlled substance
- Transporting placardable hazardous materials, with other applicable offenses
- Violating Out of Service Order
- Violating Out of Service Order & transporting placardable hazardous materials
- Violating Out of Service Order & operating CMV designed for 16+ passengers
- Railroad grade crossing violations specific to CMV's

III. Contingencies/Variations:

None

Standard Operating Procedure: **General Employee Requirements**

Author: MRP

Department: **Operations Division**

Issue Date: 06/01/95

SOP #: **02-01-c1**

Rev. Date: 12/13/02

I. Procedure Name: **Employee Identification**

II. Basic Procedure:

Every employee has been issued an employee identification tag. You are asked to keep these tags in the vehicle in which you normally ride. The tag should be worn all day.

The reason you are being asked to wear these tags is to let school based personnel know that you are an employee of the School District.

If you need a replacement contact the Administrative Secretary in your respective departments.

III. Contingencies/Variations:

None

Standard Operating Procedure: **General Employee Requirements**

Author: MRP

Department: **Operations Division**

Issue Date: 06/01/95

SOP #: **02-01-c2**

Rev. Date: 12/13/02

I. Procedure Name: **Conduct Off The Job**

II. Basic Procedure:

The Escambia School District has always expected employees to conduct themselves in a responsible manner while on the job. They are representing the Escambia School District to the general public both in their day-to-day activities and in traveling to and from job sites. Disciplinary action may be taken against employees who show a lack of concern for the general public, students and fellow School District employees.

Normally, the Escambia School District does not concern itself with activities an employee may engage in while off his/her job at night or weekends. However, when an employee's conduct away from his job affects the employee's ability to accomplish his or her job tasks, it may then become necessary to bring disciplinary action against the employee. Each case will be handled individually and investigated thoroughly. Any employee who has knowledge of another employee's offense and fails to notify his superior may also be subject to disciplinary action. The disciplinary action can range from a Letter of Reprimand to a Request for Dismissal.

It shall be the responsibility of each employee to conduct himself or herself in a responsible manner while not on the job

III. Contingencies/Variations:

None

Standard Operating Procedure: **Regulations, Rules and Laws**

Author: MRP

Department: **Operations Division**

Issue Date: 06/01/95

SOP #: **02-01-d1**

Rev. Date: 12/13/02

I. Procedure Name: **General**

II. Basic Procedure:

Each employee has the responsibility of abiding by all Federal, State or local laws or ordinances. Each employee is responsible for carrying out his assigned responsibilities following all rules and regulations applicable to them.

III. Contingencies/Variations:

None

Standard Operating Procedure: **Regulations, Rules and Laws**

Author: MRP

Department: **Operations Division**

Issue Date: 06/01/95

SOP #: **02-01-d2**

Rev. Date: 12/13/02

I. Procedure Name: **Florida's Clean Indoor Air Law**

II. Basic Procedure:

Employees are not permitted to smoke any tobacco products in any building owned or leased by the School District. Employees are not permitted to smoke any tobacco products on any School District owned campuses (outside or inside).

III. Contingencies/Variations:

None

Standard Operating Procedure: **Regulations, Rules and Laws**

Author: MRP

Department: **Operations Division**

Issue Date: 06/01/95

SOP #: **02-01-d3**

Rev. Date: 12/13/02

I. Procedure Name: **Usage of Smokeless Tobacco Products**

II. Basic Procedure:

Employees are not permitted to use smokeless tobacco products in any building owned or leased by the School District.

III. Contingencies/Variations:

None

Standard Operating Procedure: **Rules, Regulations and Laws**

Author: MRP

Department: **Operations Division**

Issue Date: 06/01/95

SOP #: **02-01-d4**

Rev. Date: 12/13/02

I. Procedure Name: **Florida's Right to Know Law**

II. Basic Procedure:

Each employee has the right to know the chemical make-up of any toxic materials he/she may come in contact with while performing his/her duties. Material Safety Data Sheets (MSDS) are available for all materials used in the workplace. If a data sheet is not available, the employee is to notify his/her supervisor to receive the material safety data sheets of the particular chemical in which he/she is interested.

III. Contingencies/Variations:

None

Standard Operating Procedure: **Regulations, Rules and Laws**

Author: MRP

Department: **Operations Division**

Issue Date: 06/01/95

SOP #: **02-01-d5**

Rev. Date: 12/13/02

I. Procedure Name: Drug-Free Workplace

II. Basic Procedure:

1. Personnel of the School Board shall not manufacture, distribute, dispense, possess or use on or in the workplace any alcoholic substance, any intoxicating or auditory, visual, or mental altering chemical or substance or narcotic drug, hallucinogenic drug, amphetamine, barbiturate, marijuana or any other controlled substance, as defined by Federal or State law or rule, or any counterfeit of such drugs or substances all being collectively referred to as drugs.
2. "Workplace" is defined to mean the site for the performance of work done in connection with employment. That includes any school building or any school premises; any vehicle used to transport students to and from school and school activities off school property during any school-sponsored or school-approved activity, event or function, such as a field trip or athletic event, where students are under the jurisdiction of the School Board.
3. As a condition of employment, each employee shall notify his or her supervisor of his or her conviction of any criminal drug statute no later than five days after such conviction. An employee who violates the terms of this policy may be non-renewed or his or her employment may be suspended or terminated. However, at the discretion of the School Board such employee may be allowed to satisfactorily participate in and complete a drug abuse assistance or rehabilitation program approved by the School Board in lieu of a non-renewal, suspension or termination. Sanctions and discipline against personnel, including non-renewal, suspension and termination shall be in accordance with prescribed School Board procedures and shall be commenced within 30 days of receiving notice of an employee's conviction. Within ten days of receiving notice of an employee's conviction in violation of this rule, the Superintendent shall notify the State and Federal Departments of Education.
4. A drug-free awareness program is hereby established, and is to be implemented by the Superintendent, to inform personnel of the dangers of drug abuse in the workplace, of the School Board's policy of maintaining a drug-free workplace, of available drug counseling, rehabilitation, and assistance programs, and of the penalties to be imposed for drug abuse violations. As a part of this program, all personnel and applicants for employment shall be given notice of the School Board's policy regarding the maintenance of a drug-free workplace in the following form: **continued...**

- I. Procedure Name: **Drug-Free Workplace**
- II. Basic Procedure: continued

NOTICE TO EMPLOYEES REGARDING DRUG-FREE WORKPLACE PROGRAM

YOU ARE HEREBY NOTIFIED that it is a condition of employment that you refrain from using drugs on or off the job. As part of the Drug-Free Workplace Program the Board has instituted a drug-testing program. It is a violation of the policy of the School Board for any employee to manufacture, distribute, dispense, possess or use drugs whether in the workplace or away from the workplace including non-working hours. Lawful consumption of alcohol during non-working hours and aware from the workplace that does not adversely impact the employee's work performance or fitness for duty is not a violation of the Drug-Free Workplace Program of School Board Policy.

All employees are subject to drug testing. Refusal to submit to a drug test may subject the employee to termination and, where on-the-job injury is at issue, loss of workers' compensation medical and indemnity benefits. The Drug-Free Workplace Program adopted by the Escambia County School Board authorizes the following types of drug tests:

- (a) Job applicant. An employer must require job applicants to submit to a drug test and may use a refusal to submit to a drug test or positive confirmed drug test as a basis for refusal to hire the job applicant.
- (b) Reasonable suspicion. An employer must require an employee to submit to reasonable suspicion drug testing.
- (c) Routine fitness for duty. An employer must require an employee to submit to a drug test if the test is conducted as part of a routinely scheduled employee fitness-for-duty medical examination that is part of the employer's established policy or that is scheduled routinely for all members of an employment classification or group.
- (d) Follow-up. If the employee in the course of employment enters an employee assistance program for drug-related problems, or an alcohol and drug rehabilitation program, the employer must require the employee to submit to a drug test as a follow-up to such programs, and on a quarterly, semiannual, or annual basis for up to two years thereafter.
- (e) On-the-job injury. If the employee is injured in the course of employment the employee shall be required to submit to a drug test. Necessary medical care will not be denied pending completion of, or submission to, a drug test. **continued...**

- I. Procedure Name: **Drug-Free Workplace**
- II. Basic Procedure: continued

All information, interviews, reports, statements, memoranda, and drug test results written or otherwise, received by the employer through a drug testing program are confidential communications and may not be used or received in evidence, obtained in discovery, or disclosed in any public or private proceedings, except as authorized by law.

Employees may confidentially report the use of prescription or non-prescription medications, both before and after being tested. The reports of the use of prescription drugs should include a copy of the medical prescription. Reports may be made to the employee's supervisor, principal, or director. Reports must be in writing identifying the use of prescription or non-prescription medications. Attached to this notice is a list of the most common drugs or medications by brand name or common name, as applicable as well as by chemical name, which may alter or affect a drug test. (see Attachment #1)

The Escambia County School Board has instituted an employee assistance program providing alcohol and drug rehabilitation. Employees seeking information or assistance through the program should contact the Director/Human Resources, Escambia County School District, at 215 West Garden Street, Pensacola, Florida 32501, 469-6166, for further information.

An employee or job applicant who receives a positive confirmed drug test may contest or explain the result to the employer within five (5) working days after written notification of the positive test. If an employee or job applicant's explanation or challenge is unsatisfactory to the employer, the person may contest the drug test result as provided by Rule 38F-9.09. (see Attachment #2)

The employee has the right to consult the testing laboratory for technical information regarding prescription or non-prescription medication. A list of drugs for which the employer will test, described by brand names or common names, as applicable, as well as by chemical names, is attached to this notice. (see Attachment #3)

In addition to the right of the employee to challenge or contest the results of any drug test the employee may have additional rights under a collective bargaining agreement, if any. Questions regarding the collective bargaining agreement may be directed to the appropriate bargaining unit representative. **continued...**

- I. Procedure Name: **Drug-Free Workplace**
- II. Basic Procedure: continued

The School Board is required to report an employee conviction of drug violations occurring in the workplace to the State and Federal Departments of Education within ten (10) days of receiving such notice and is also required to commence disciplinary action against such employee within thirty (30) days of receipt of the notice of violation.

- III. Contingencies/Variations:

None

ATTACHMENT "A"
OVER-THE-COUNTER AND PRESCRIPTION DRUGS
WHICH COULD ALTER OR AFFECT THE OUTCOME OF A DRUG TEST

ALCOHOL

All liquid medications containing ethyl alcohol (ethanol). Please read the label for alcohol content. As an example, Vicks Nyquil is 25% (50 proof) ethyl alcohol, Comtrex is 20% (40 proof), Contact Severe Cold Formula Night Strength is 25% (50 proof), and Listerine is 26.9% (54 proof).

AMPHETAMINES

Obetrol, Biphedamine, Desoxyn, Dexedrine, Didrex

CANNABINOIDS

Marinol (Dronabinol, THC)

COCAINE

Cocaine HCl topical solution (Roxanne)

PHENCYCLIDINE

Not legal by prescription.

METHAQUALONE

Not legal by prescription.

OPIATES

Paregoric, Parepectolin, Donnagel PG, Morphine, Tylenol with Codeine, Empirin with Codeine, APAP with Codeine, Aspirin with Codeine, Robitussin AC, Guiatuss AC, Novahistine DH, Novahistine Expectorant, Dilaudid (Hydromorphone), M-S Contin and Roxanol (morphine sulfate), Percodan, Vicodin, etc.

BARBITURATES

Phenobarbital, Tuinal, Amytal, Nembutal, Seconal, Lotusate, Fiorinal, Fioricet, Esgic, Butisol, Mebaral, Butabarbital, Butabital, Phrenilin, Triad, etc.

BENZODIAZEPINES

Ativan, Azene, Clonopin, Dalmane, Diazepam, Librium, Xanax, Serax, Tranxene, Valium, Verstran, Halcion, Paxipam, Restoril, Centrex.

METHADONE

Dolphine, Methadose.

PROPOXYPHENE

Darvocet, Darvon N, Dolene, etc.

Attachment #1
02-01-d5

ATTACHMENT "B"
CHALLENGES TO TEST RESULTS

- (1) A requirement of a drug-free workplace program is that within five (5) working days after receiving notice of a positive confirmed test result, the employee must be allowed to submit information to an employer explaining or contesting the test results. If an employee's explanation or challenge of the positive test results is unsatisfactory to the employer, within fifteen (15) days of receipt of the explanation or challenge, a written explanation as to why the employee's explanation is unsatisfactory, along with the report of positive results, shall be provided by the employer to the employee. All such documentation shall be kept confidential by the employer and shall be retained by the employer for at least one year.

- (2) An employer or job applicant may undertake an administrative challenge by filing a claim for benefits with a Judge of Compensation Claims pursuant to Chapter 440 F.S., or if no workplace injury has occurred, the person must challenge the test result in a court of competent jurisdiction. When an employee undertakes a challenge to the results of a test, it shall be the employee's responsibility to notify the laboratory and the sample shall be retained by the laboratory until the case is settled.

ATTACHMENT "C"
DRUGS FOR WHICH THE EMPLOYER WILL TEST

Alcohol	0.05g/dl% or above
Amphetamines	
Cannabinoids	
Cocaine	
Phencyclidine	
Methaqualone	
Opiates	
Barbiturates	
Benziazepines	
Synthetic Narcotics:	
Methadone	
Propoxyphene	

Statutory Authority: Sections 230.03(2), 230.22(2), 231.001, & 440.103, Florida Statutes.

Law Implemented: Section 230.23(4) & 440.102, Florida Statutes.

Attachment #3
02-01-d5

Standard Operating Procedure: **Regulations, Rules and Laws**

Author: MRP

Department: **Operations Division**

Issue Date: 06/01/95

SOP #: **02-01-d6**

Rev. Date: 12/13/02

I. Procedure Name: Zero Tolerance for Crime and Substance Abuse

II. Basic Procedure:

As per School District Rule 7.14 all employees shall adhere to the following:

- (1) Crime and substance abuse are not tolerated in this school district. Delinquent acts and crimes occurring whenever and wherever students are under the jurisdiction of the school district must be timely and properly reported to the appropriate law enforcement agency.
- (2) Each school principal is responsible for ensuring (a) that all school personnel are properly informed as to their responsibilities regarding crime reporting, (b) that appropriate delinquent acts and crimes are properly reported, and (c) that actions taken in cases with special circumstances are properly taken and documented.
- (3) On or after the effective date of this rule, the district shall enter into an agreement or agreements with the County Sheriff's Office and/or local Police Departments specifying guidelines for ensuring that (a) felonies and violent misdemeanors, whether committed by a student or an adult, and (b) delinquent acts that would be felonies or violent misdemeanors if committed by an adult are reported to law enforcement.
- (4) Such agreement or agreements shall include (a) the role of school resources officers, if applicable, in handling reported incidents, (b) special circumstances in which school officials may handle incidents without filing a report to law enforcement, and (c) a procedure for ensuring that school personnel properly report appropriate delinquent acts and crimes.

Statutory Authority: Sections: 230.03(2), 230.22(1), (2), 230.23(17), and 230.23005, Florida Statutes

Law Implemented: Section: 230.235, Florida Statutes

III. Contingencies/Variations:

None

Standard Operating Procedure: **Regulations, Rules and Laws**

Author: MRP

Department: **Operations Division**

Issue Date: 06/01/95

SOP #: **02-01-d7**

Rev. Date: 12/13/02

I. Procedure Name: **Fraternizing with Students**

II. Basic Procedure:

Employees are not to fraternize with students enrolled in the Escambia County School District from K - 12.

III. Contingencies/Variations:

None

I. Procedure Name: **Conflict of Interest**

II. Basic Procedure:

No employee shall solicit or accept anything of value to the recipient, including a gift, loan, reward, promise of future employment, favor, or service, based upon any understanding that the official action, or judgment of the employee would be influenced thereby.

In doing business with the School District, no employee acting in his official capacity shall either directly or indirectly purchase, rent, or lease any realty, goods, or services for the School District from any business entity of which he or his spouse or child is an officer, partner, director, or proprietor or an employee of his spouse or child, or any combination of them, has a material interest.

No employee or his spouse or minor child shall, at any time, accept any compensations, payment, or thing of value when such employee knows, or, with the exercise of reasonable care, should know, that it was given to influence an action in which the employee was expected to participate in his official capacity.

No employee shall corruptly use or attempt to use his official position or any property or resource which may be within his trust, or perform his official duties, to secure a special privilege, benefit, or exemption for himself or others.

An employee shall not have or hold any employment or contractual relationship that will create a continuing or frequently recurring conflict between his private interests and the performance of his public duties or that would impede the full and faithful discharge of his public duties.

Statutory Authority: Section 112.313 item 7
Florida Statutes

III. Contingencies/Variations:

None

I. Procedure Name: Disclosure of Dual Employment or Contractual Relationship

II. Basic Procedure:

Each district employee is required to give notice of dual employment or contractual relationship by completing the attached form and forwarding it to the Human Resources Department. (See Attachment #1)

III. Contingencies/Variations:

None

- I. Procedure Name: **JLA Line-of-Sight for One Time Vendor Services**
- II. Basic Procedure:

Purpose of this procedure is to standardize the methodology for administering one time vendor services with respect to compliance with the Jessica Lundsford Act (JLA), 1012.468(2)(a) F.S. and School Board Rule 6GX 17-5.12.

Pursuant to SBR 5.12 (4)(B) Line-of-sight may be used for individual contractors providing training or educational resource presentations provided they are escorted by Responsible District Staff Member (RDSM) to and from the delivery venues and remain under constant supervision throughout their lecture/training delivery obligation. Departments utilizing such individual contractors must notify the Protection Services Division in writing prior to their arrival. Furthermore, these exempted individual contractors must be checked against the national sexual offender database by the RDSM.

The provisions set forth in SBR 5.12(4)(B) and the following procedures shall be used for one time visits only. It is incumbent upon contracting district departments to inform contractors and service providers that they should take advantage of visits to secure appropriate credentialing if there is an anticipation of subsequent visits.

A. Responsible District Staff Member

1. Prior to execution of contract a RDSM shall be identified that will retain the subject contract service provider in line-of-sight at all times while escorting the provider/contractor to and from venues and at all times, under constant supervision, throughout the delivery obligation. The Responsible District Staff Member shall be of the same sex as the service provider to afford ability to remain in constant supervision.
2. The RDSM shall be identified on the One Time Vendor Line-of-Sight Notification Form (Attachment #1).

B. Notification – Purchasing

1. If the department requesting the contract wishes to use the line-of-sight provisions for a one time service provider, the requesting department shall provide the Purchasing Department with a completed One Time Vendor Line-of-Sight Notification Form prior to the execution of the

II. Basic Procedure: Continued

contract. The notification form shall accompany the contract at time of submittal whenever possible.

2. It is the requesting department's responsibility to ensure all portions of the Notification Form are complete including identification of the RDSM and affirmation that the service provider has been checked against the national sexual offender database for both the state of Florida and the state in which the organization resides.

C. Notification – Protection Services

1. Prior to contractor arrival the department requesting the contract shall notify Protection Services in writing by forwarding a completed One Time Vendor Line-of-Sight Notification Form to Protection Services Division Manager.

III. Contingencies/Variations:

- A.** Contract service provider un-identified until shortly before service delivery.

In the event a contractor is unable to identify who will be delivering services until shortly before the actual service delivery date the following procedure shall apply:

1. In the event the service provider is unable to identify the name and sex of the contractor who will be delivering service until shortly before service delivery, notification to both Purchasing and Protection Services must still occur in accordance with the provisions of this procedure.
2. It is the responsibility of the Department Head of the requesting department to ensure that prior to delivery of service the Notification Form and database screening are completed and forwarded to the necessary departments and that all requirements set forth in the pertinent School Board Rule(s) have been satisfied.
3. Under no circumstance shall any service provider be allowed to render services under line-of-sight provisions in advance of the full completion of the One Time Vendor Line-of-Sight Notification Form and necessary provisions thereof.



SCHOOL DISTRICT OF ESCAMBIA COUNTY
 Operations Department
 75 N. Pace Blvd., Pensacola, FL 32505
 Phone: (850)469-6141 Fax: (850)469-6371

ONE TIME VENDOR LINE-OF-SIGHT NOTIFICATION FORM

REFERENCE

Section 5.12(4)(B) Provides for the one time authorization of Line-of-Sight provisions for certain service providers as follows:

Line-of-sight may be used for individual contractors providing training or educational resource presentations provided they are escorted by Responsible District Staff Member to and from the delivery venues and remain under constant supervision throughout their lecture/training delivery obligation. Departments utilizing such individual contractors must notify the Protection Services Department in writing prior to their arrival. Furthermore, these exempted individual contractors must be checked against the national sexual offender database by the Responsible District Staff Member.

National Sexual Offender Database: <http://www.fbi.gov/scams-safety/registry>

VENDOR/CONTRACTOR INFORMATION

Organization/Company Name: _____

Organization/Company Address: _____

Service Provider Full Name:

First Name: _____ Middle Name: _____ Last Name: _____

Vendor Service Provider Gender: M F Vendor Service Provider Contact Ph. #: (____) _____ - _____

Date(s) of Service Delivery: _____

DISTRICT RESPONSIBLE STAFF MEMBER

District Responsible Staff Member (DRSM) Full Name:

First Name: _____ Middle Name: _____ Last Name: _____

DRSM Gender: M F DRSM Contact Ph. #: (____) _____ - _____

COMPLIANCE

I certify that the above named Service Provider has been checked against the national sexual offender database for the State of Florida and the state in which the organization is located and that the above named Service Provider is not listed in either database.

I further certify that the above named Service Provider is providing one time services for the School District commensurate with those permissible under SBR 6 GX-17 5.12 (4) Line of Sight Provisions and that the above named District Responsible Staff Member understands the requirements set forth in SOP 12-01-d10 JLA Line-of-Sight for One Time Vendor Services.

Requesting Department Head Signature: _____ Date: _____

Requesting Department Head Name: _____

Standard Operating Procedure: **Disclosure of Dual Employment or Contractual Relationship**

TO WHOM IT MAY CONCERN:

I, THE UNDERSIGNED EMPLOYEE OF THE SCHOOL DISTRICT OF ESCAMBIA COUNTY, FLORIDA, HEREBY GIVE NOTICE THAT I HAVE OR HOLD EMPLOYMENT OR A CONTRACTUAL RELATIONSHIP WITH OR AM AN OFFICER, PARTNER, DIRECTOR OR PROPRIETOR OF

PRINT

WHICH IS SUBJECT TO THE REGULATION OF, OR IS DOING BUSINESS WITH SAID SCHOOL DISTRICT.

DATE

SCHOOL DISTRICT EMPLOYEE SIGNATURE

PRINT EMPLOYEE NAME

PRINT WORK LOCATION

Send copies to:
School Board of Escambia County, Florida
c/o Human Resources Department
215 West Garden Street, Pensacola, Florida 32501
and
Supervisor of Elections
Escambia County Courthouse
Pensacola, Florida 32501

Revised 2/17/95
DRG/clc

Attachment #1
02-01-d9

I. Procedure Name: **Annual Leave**

II. Basic Procedure:

1. Leave requests must be submitted to the appropriate supervisor. Voice mail messages are not acceptable. You must speak with the supervisor or his/her designee.
2. A minimum two-day notice is preferred for leave requests.
3. Employees who will need leave for a portion of a workday are required to submit leave requests to their Supervisor by 7:00 a.m. that morning.

III. Contingencies/Variations:

Emergencies

1. If the employee has an emergency that requires the use of annual leave, he/she should notify his/her supervisor immediately.

I. Procedure Name: **Sick Leave**

II. Basic Procedure:

1. Call-ins must be done within one hour of the beginning of your scheduled work time.
2. Calls should be made to your immediate supervisor to request sick leave. Voice mail or Email messages are not acceptable. If the supervisor is off, the request should be made to his/her designee.
3. Indicate expected return date, if possible. You are expected to call in every three working days past initial call.
4. You may be required to bring a Doctor's note if you are out for five consecutive days or more or if sick leave usage is deemed to be excessive.

III. Contingencies/Variations:

None

I. Procedure Name: **Personal Leave**

II. Basic Procedure:

By contract, permanent employees of the Escambia County School Board are allowed to take (6) six days per school year of personal leave. These six days of personal leave are automatically deducted from an employee's accrued sick leave. Requests for personal leave should be made to employee's immediate supervisor. Voice mail or Email messages are not acceptable.

If an employee requests more than the allotted six days of personal leave, those days beyond the sixth day are considered as **LEAVE WITHOUT PAY** even if there is accrued annual leave on the books.

IT IS THE RESPONSIBILITY OF THE EMPLOYEE TO KEEP TRACK OF HIS/HER OWN PERSONAL LEAVE ON A PER SCHOOL YEAR BASIS. PERSONAL LEAVE ONCE REQUESTED, APPROVED, AND POSTED CANNOT BE CHANGED.

III. Contingencies/Variations:

None

I. Procedure Name: **Jury Duty**

II. Basic Procedure:

1. When a summons is received, the employee should inform his or her supervisor immediately and take the summons to the person responsible for payroll. A copy will be made to attach to the leave slip. If employee is not selected to serve on a jury, he or she will return the form issued by the Court with date and time released indicated on the form by a representative of the Clerk of Courts office. Employee needs to ask for the date and time to be stamped on the form. Employee will report to work if he or she has been excused in time to work at least half or more of the regularly scheduled work day. Employee does not have to report to work if released after 1:00 PM.
2. If selected to serve on a jury, notify your supervisor immediately. Employee will report to work on any day he or she has been excused in time to work at least half or more of the regularly scheduled work day. Employee does not have to report to work if released after 1:00 PM.
3. Upon completion of jury duty, the form issued by the Court should be submitted to the Maintenance Office for submission to the Payroll Department.

III. Contingencies/Variations:

None

I. Procedure Name: **Jury Duty**

II. Basic Procedure:

1. When a summons is received, the employee should inform his or her supervisor immediately and take the summons to the person responsible for payroll. A copy will be made to attach to the leave slip. If employee is not selected to serve on a jury, he or she will return the form issued by the Court with date and time released indicated on the form by a representative of the Clerk of Courts office. Employee needs to ask for the date and time to be stamped on the form. Employee will report to work if he or she has been excused in time to work at least half or more of the regularly scheduled work day. Employee does not have to report to work if released after 1:00 PM.
2. If selected to serve on a jury, notify your supervisor immediately. Employee will report to work on any day he or she has been excused in time to work at least half or more of the regularly scheduled work day. Employee does not have to report to work if released after 1:00 PM.
3. Upon completion of jury duty, the form issued by the Court should be submitted to the Maintenance Office for submission to the Payroll Department.

III. Contingencies/Variations:

None

I. Procedure Name: **Absence Without Leave**

II. Basic Procedure:

Personnel willfully absent from duty without leave shall forfeit compensation for the time of such absence and shall be subject to further discipline, including termination of employment.

III. Contingencies/Variations:

None

I. Procedure Name: Compensatory Time

II. Basic Procedure:

1. Employees who are required or directed to work for more than forty (40) hours per week, as defined in the Fair Labor Standards Act, shall be granted compensatory time at the rate of one and one-half (1 1/2) hours for each hour of employment for which overtime compensation is required by Section 7 of the Fair Labor Standards Act or shall be compensated at the rate of one and one-half (1 1/2) times the employee's normal rate of pay. All other compensatory time granted (except emergency duty) shall be at the rate of one (1) hour for each hour of employment or compensated at the rate of one (1) times the employee's normal rate of pay. With the exception of emergency duty, all comp time worked must have prior verbal or written approval by the Department Head.
2. "Off" hours shall be defined as time outside of the employee's regularly scheduled workday. "Off" days shall be defined as days outside of the employee's regularly scheduled workweek.
3. Two (2) hours' pay shall be the minimum for call-out during "off" hours or "off" days. Call out for all employees during "off" days or "off" hours shall be considered overtime at the rate of one and one-half (1 1/2) times the employee's normal rate of pay. Call out is defined as emergency work designated by the appropriate supervisor or administrator and performed during "off" days or "off" hours.
4. The overtime logs (Emergency Call Out and Regular) require the supervisor's signature to add time. The employee will use the district-approved leave form when requesting to use earned comp time. Overtime logs are available in the Maintenance Department office. In the event of a transfer, this information should be forwarded to the new work location. If the employee leaves the system, this information should be forwarded to the payroll department for payment consideration.
5. Compensatory time is available for all hourly rate of pay employees in the District. Compensatory time earned for emergency call outs is posted the first business day following the time was earned. Compensatory time earned for regular/planned overtime is posted the first business day following the week in which the time was earned. This is necessary in order to determine accrual rate [straight time or time and one-half (1 1/2)].

III. Contingencies/Variations:

None

- I. Procedure Name: **School Board Agenda Item Submission (no Legal Review)**
- II. Basic Procedure:

Purpose of this procedure is to communicate to staff the expectations associated with staff forwarding critical information for placement on any School Board workshop, regular or special meeting.

1. Department staff identify that an item requires School Board approval.
2. Department staff informs immediate supervisor that the item meets one or more of the criteria requiring School Board approval and submits completed executive summary along with all agenda item back-up material to immediate supervisor requesting placement on the specific meeting agenda.
3. Departments shall compile all such agenda item needs and convene at a minimum, the Department Head, the requesting staff member, the Department secretary or at least one clerical staff member and any relevant subject matter expert(s) (SME) for a full item submission review meeting.
4. In the Item Review Meeting (IRM) the requesting staff member shall present the item for review along with all pertinent back-up and the executive summary that will accompany the item.
5. The focus of the IRM shall be to first assess each submitted item for accuracy and completeness. Each member of the IRM group shall also review for form, grammar, punctuation and format.
6. It is the submitting staff member's responsibility, working with relevant SME to assure content accuracy.
7. Upon completion of the IRM, any item found delinquent shall be deferred to the next IRM. Items passing the IRM shall be forwarded to the Assistant Superintendent – Operations for review and approval no later than two (2) days prior to the published agenda item deadline.
8. The Division Secretary shall review all submittals for format, grammar and punctuation. Any errors or concerns shall be returned to the Department Secretary immediately for corrective action. Items requiring corrections shall be resubmitted to the Division Secretary no later than 24-hours prior to the agenda submission deadline unless special consideration is requested and approved by the Assistant Superintendent – Operations.

- I.** Procedure Name: **School Board Agenda Item Submission (no Legal Review)**
- II.** Basic Procedure: Continued
9. Upon completion of Division Secretary review, items shall be provided to the Assistant Superintendent – Operations in FINAL form for final approval.
 10. The Assistant Superintendent – Operations shall review all submissions and executive summaries for:
 - Completeness
 - Accuracy
 - Form
 - Grammar
 - Punctuation
 11. Any items submitted to Assistant Superintendent in FINAL form that are found to require corrective action shall be returned to the Departments and shall not appear on the requested agenda and will be deferred to the next agenda unless special consideration due to extraordinary circumstances is requested and approved by the Assistant Superintendent – Operations.
 12. Upon completion of FINAL review all items shall be signed and provided to the Division Secretary.
 13. Division Secretary will assign an agenda item number on the executive summary to each item submitted.
 14. Division Secretary will compile all agenda items submitted by Operations Divisions, create a list of items for submission to Recording Secretary by published deadline.
 15. Division Secretary will duplicate, compile and submit Operations Agenda to Recording Secretary by published deadline.
- III.** Contingencies/Variations: School Board Agenda Item Submission (Legal Review Required)
1. Procedural steps 1 – 8 above remain the same with the following exception. Items requiring legal review shall be submitted to the Division Secretary (Step 7) no later than two (2) days prior to the published Legal Review deadline.

- III.** Contingencies/Variations: School Board Agenda Item Submission (Legal Review Required)
2. Procedural steps 9 – 12 above remain the same with the following exception. Upon completion of FINAL review Assistant Superintendent shall return the items unsigned for Division Secretary to prepare the Document Review and Approval Form and subsequently provide to the Legal Office in accordance with the Legal Review submission process and timeline.
 3. Upon receipt of Legal Review, comments/ revisions, if any, submission process resumes at steps 7 and 8 above.
 4. Upon receipt of revised documents, if required, items will be resubmitted for General Counsel review and approval as to form. Steps 3 and 4 will be repeated as needed until documents meet/receive General Counsel approval.
 5. Procedural steps 13-15 above remain the same.
- IV.** Contingencies/Variations: School Board Agenda Item Submission
1. Information to the Board Only Items – a written request will be submitted for the workshop agenda by the Assistant Superintendent – Operations to the Deputy Superintendent.
 2. Committee/Departmental Reports – a written request will be submitted by the Assistant Superintendent – Operations to the Deputy Superintendent.
 3. Amended Back-up – a written request will be submitted by the Assistant Superintendent – Operations to the Deputy Superintendent.
 4. Request to Pull/Add Late Agenda Items – a written request will be submitted by the Assistant Superintendent – Operations to the Deputy Superintendent.

Standard Operating Procedure: **Monthly School Board Agenda**

Author: TAK

Department: **Operations Division**

Issue Date: 9/16/02

SOP #: **02-01-e7**

Rev. Date: 11/18/08

THE SCHOOL DISTRICT OF ESCAMBIA COUNTY Operations/Finance and Business Services		SCHOOL BOARD AGENDA EXECUTIVE SUMMARY	
AGENDA DATE:		ITEM NUMBER:	
AGENDA REFERENCE:		FISCAL IMPACT / AMOUNT:	
FUND SOURCE:			
BACKGROUND INFORMATION / DESCRIPTION:			
EDUCATIONAL IMPACT:			
OTHER REFERENCES OR NOTES:			
ACTION REQUIRED:			
STRATEGIC ALIGNMENT:			
GOAL:			
OBJECTIVE:			
REQUESTED BY:		DATE:	
ASSISTANT SUPERINTENDENT:		DATE:	DATE OF BOARD APPROVAL:

Attachment #1

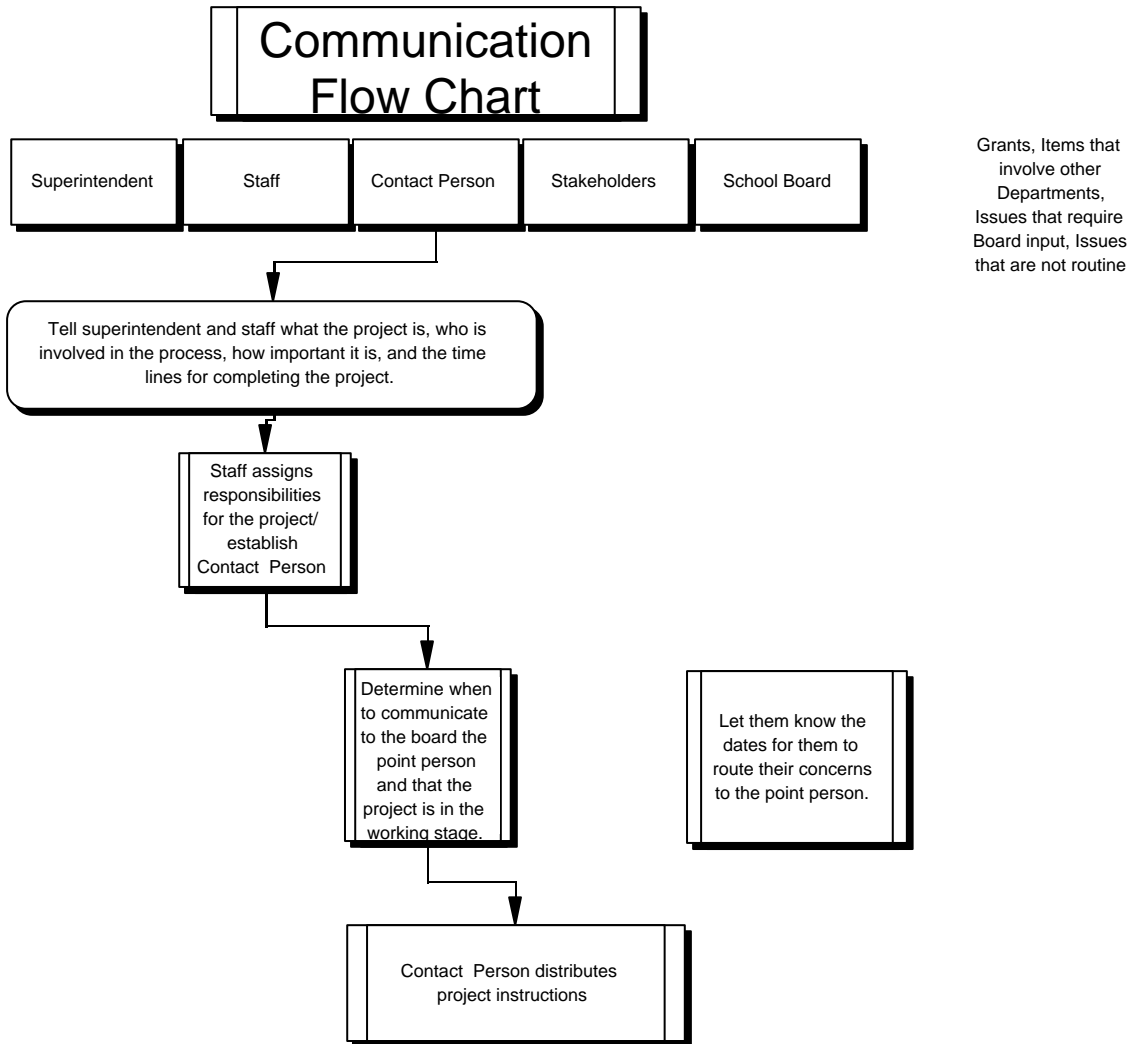
I. Procedure Name: Leadership Team Agenda Items

II. Basic Procedure:

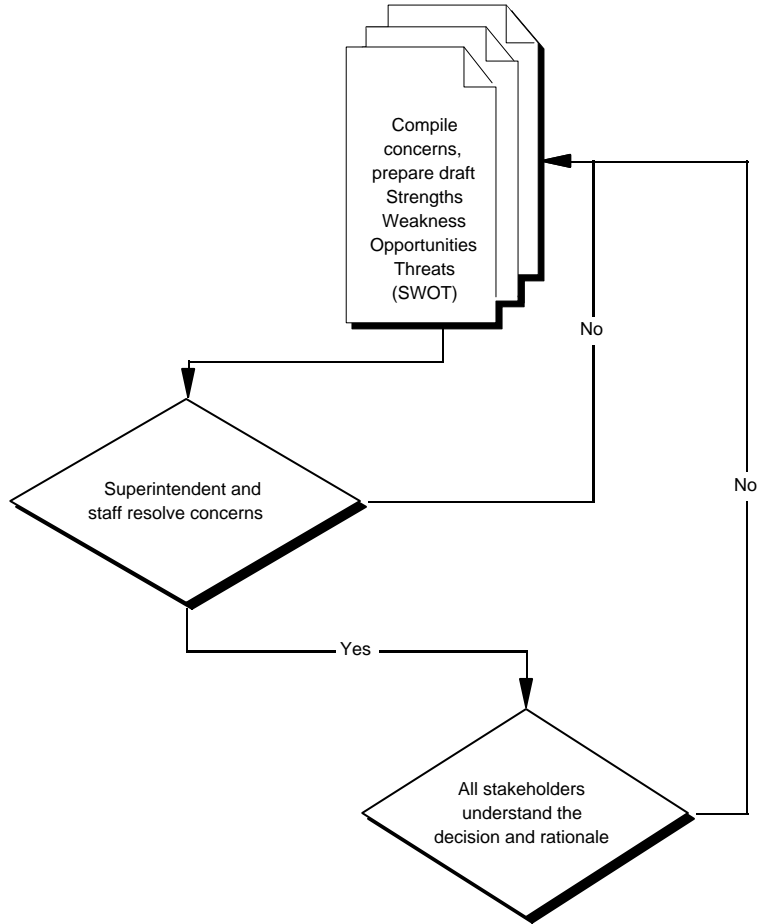
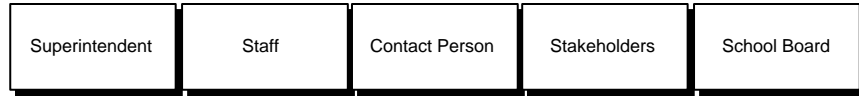
1. Items to be considered for the Leadership Team Agenda must be submitted to the Assistant Superintendent – Operations.
2. For Action Items, any back-up or supporting documents, if needed, are to be forwarded to the Assistant Superintendent – Operations for consideration one week prior to the next Leadership Team Meeting. Leadership Team Meetings are generally scheduled for every other week on Mondays.
3. For Information Items, back-up and supporting documents should be forwarded to the Assistant Superintendent – Operations as soon as possible. Assistant Superintendent will determine which Leadership Team Meeting to schedule the information item on and will inform the contact person if he/she will be required to attend and present the item.

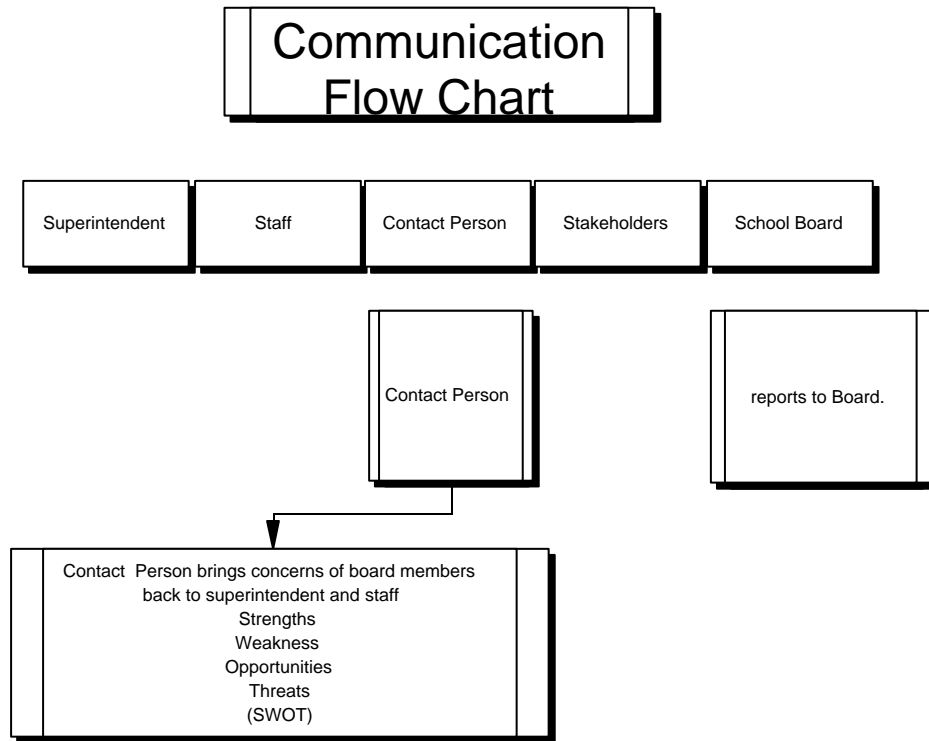
III. Contingencies/Variations:

1. Emergency items can be considered by the Leadership Team. Any emergency items should follow the same format and be submitted to the Assistant Superintendent – Operations as soon as possible.
2. Leadership Team approval regarding grants, significant issues that involve other departments or issues that require Board input should follow the attached flowchart (Attachments 2 – 5).

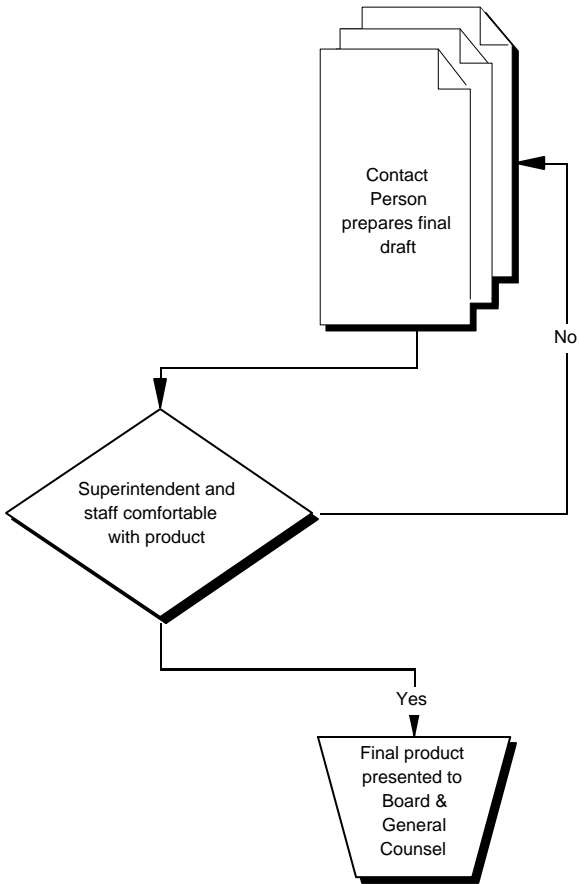
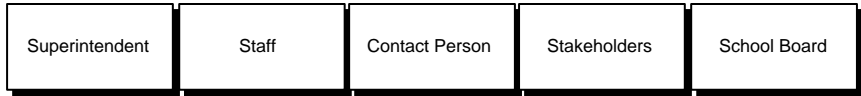


**Communication
Flow Chart**





Communication Flow Chart



I. Procedure Name: Revisions/Additions to Policies and Procedures

II. Basic Procedure:

1. Draft revision/additions should be submitted to the Assistant Superintendent – Operations for his/her review.
2. If the policy or procedure will affect other Operations Divisions Departments, it will be scheduled for review at the next Operations Staff Meeting.
3. If the policy or procedure will affect other district departments, the Assistant Superintendent – Operations will seek senior staff approval.
4. Once the Assistant Superintendent – Operations has received the appropriate approvals, he/she will forward the approved policy/procedure to all Operations Division Departments.
5. If this is a revision of any existing policy/procedure, the Revisions/Additions Summary is completed and the existing policy/procedure is removed from the manual. If this is an addition, the Revisions/Additions summary is completed and the addition is added to the manual. (see Attachment #1) Revised pages and Revisions/Additions Summary page will be copied and sent to all manual holders.
6. Revise respective Table of Contents.
7. Policies and Procedures Manual is updated on the department's website.
8. Download most recent revisions/additions summary by clicking here: [Revisions/Additions to Policies and Procedures](#)

III. Contingencies/Variations:

None

REVISIONS/ADDITIONS SUMMARY

	Revision Date	Sections Affected	Revision Type*	Comments	Initials
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					
26					
27					
28					
29					
30					

*Revision Type

- ADD: Complete addition of new SOP
- DEL: Complete deletion of existing SOP
- TXT REV: Revision of text of an existing SOP

**Attachment #1
03-01-e9**

I. Procedure Name: School Board Member Request for Information Protocol

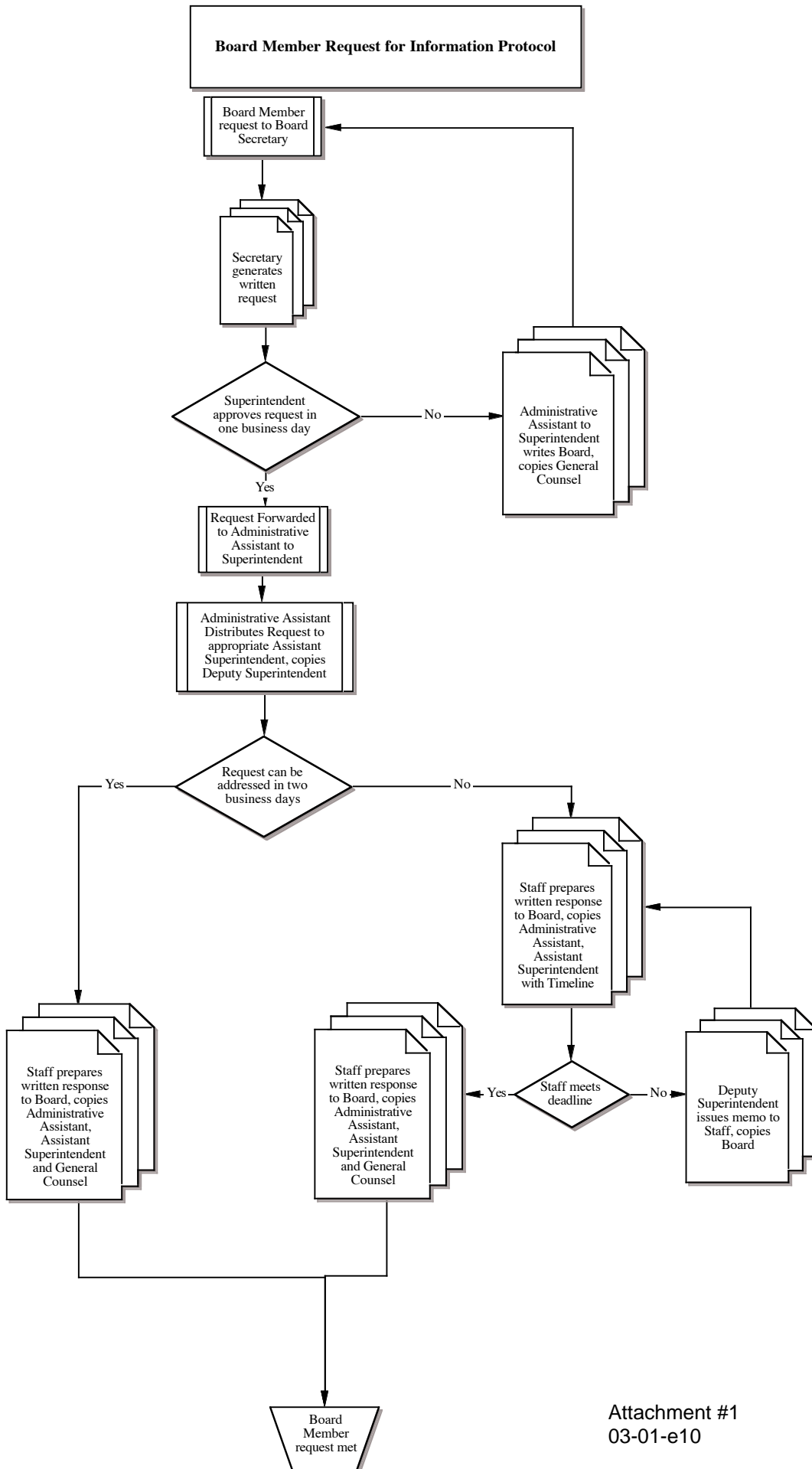
II. Basic Procedure:

Purpose of this policy is to communicate to the Board and staff the expectations associated with staff addressing Board Member requests in a timely manner.

1. Board Member request for information submitted to Board Secretary.
2. Secretary generates a written request and forwards request to Superintendent.
3. The Superintendent will process this request in one business day. If the Superintendent approves the request, it is forwarded to the Administrative Superintendent to the Superintendent. If the Superintendent does not approve the request, it is rejected in writing to the Board and General Counsel.
4. The Administrative Assistant forwards the approved request to the appropriate Assistant Superintendent and copies the Deputy Superintendent.
5. If the request can be addressed in two business days, the staff prepares a response to the Board, copies the Administrative Assistant, Assistant Superintendent and General Counsel.
6. If the item cannot be addressed in two business days, staff prepares a written response to the Board, copies Administrative Assistant and Assistant Superintendent with a timeline for completing the request. To complete the request, the staff prepares a response to the Board, copies the Administrative Assistant, Assistant Superintendent and the General Counsel.
7. Should the staff be unable to meet the timeline, identified in paragraph #6, the Deputy Superintendent issues a memo to staff, copies the Board with a new timeline for completion.

III. Contingencies/Variations:

None



Standard Operating Procedure: **Administration**

Author: TAK

Department: **Operations Division**

Issue Date: 01/31/03

SOP #: **03-01-e11**

Rev. Date:

I. Procedure Name: **Record Retention**

II. Basic Procedure:

The state of Florida has rules regarding the retention of records. The School District of Escambia publishes the guidelines on an annual basis.

III. Contingencies/Variations:

None

Standard Operating Procedure: **Administration**

Author: TAK
Issue Date: 01/31/03
Rev. Date:

Department: **Operations Division**
SOP #: **03-01-e12**

- I. Procedure Name: **Open Government**
- II. Basic Procedure:

Florida Statutes requires public access to government in our state.

Florida's Government-in-the-Sunshine law provides a right of access to governmental proceedings at both the state and local levels. The following attachment covers some of the issues associated with meetings and public records. More information can be found below:

<http://myfloridalegal.com/sunshine>

- III. Contingencies/Variations:

None



February 18th 2003

- Overview
- Florida Attorney General
- Frequently Asked Questions
- How to Contact Us
- Consumer Protection
- News Releases
- Citizen Safety Center
- Crime Prevention
- Crime Victims' Services
- Sunshine Law
- Attorney General Opinions
- Criminal Justice Programs
- Civil Rights
- Statewide Prosecutor
- Solicitor General
- General Legal Division
- Technology
- Employment Opportunities
- Government Links

Government-in-the-Sunshine Manual

Chapter updated: 02/14/2003



2003 Inauguration

What is a meeting subject to the Sunshine Law?

1. Number of board members required to be present

The Sunshine Law extends to the discussions and deliberations as well as the formal action taken by a public board or commission. There is no requirement that a quorum be present for a meeting of members of a public board or commission to be subject to s. 286.011, F.S. Instead, the law is applicable to *any* gathering, whether formal or casual, of two or more members of the same board or commission to discuss some matter on which *foreseeable action* will be taken by the public board or commission. *Hough v. Stembridge*, 278 So. 2d 288 (Fla. 3d DCA 1973). *And see, City of Miami Beach v. Berns*, 245 So. 2d 38 (Fla. 1971); *Board of Public Instruction of Broward County v. Doran*, 224 So. 2d 693 (Fla. 1969); and *Wolfson v. State*, 344 So. 2d 611 (Fla. 2d DCA 1977). Thus, discussions between two members of a three-member complaint review board regarding their selection of the third member of the board must be conducted in accordance with the Sunshine Law. AGO 93-79.

It is the how and the why officials decided to so act which interests the public, not merely the final decision. Thus, the court recognized in *Times Publishing Company v. Williams*, 222 So. 2d 470, 473 (Fla. 2d DCA 1969), *disapproved in part on other grounds, Neu v. Miami Herald Publishing Company*, 462 So. 2d 821 (Fla. 1985):

Every thought, as well as every affirmative act, of a public official as it relates to and is within the scope of his official duties, is a matter of public concern; and it is the entire *decision-making process* that the legislature intended to affect by the enactment of the statute before us.

2. Circumstances in which the Sunshine Law may apply to a single individual or where two board members are not physically present

Section 286.011, F.S., applies to meetings of "two or more members" of the same board or commission when discussing some matter which will foreseeably come before the board or commission. Therefore, the statute would not ordinarily apply to an *individual* member of a public board or commission or to public officials who are not board or commission members. Inf. Op. to Dillener, January 5, 1990 (Sunshine Law not normally applicable to meeting of town council member with private citizens). *See, City of Sunrise v. News and Sun-Sentinel Company*, 542 So. 2d 1354 (Fla. 4th DCA 1989); *Deerfield Beach Publishing, Inc. v. Robb*, 530 So. 2d 510 (Fla. 4th DCA 1988) (requisite to application of the Sunshine Law is a meeting between two or more public officials); *Mitchell v. School Board of Leon County*, 335 So. 2d

FRAUD HOTLINE
1-866-9-NO-SCAM

Consumer Alerts

- [CD Settlement](#)
- [Cardizem](#)
- [Fraud Hotline](#)
- [Medicaid Fraud](#)
- [Identity Theft](#)

Initiatives

[Civil Rights](#)



354 (Fla. 1st DCA 1976). *But cf.*, *Jennings v. Dade County*, 589 So. 2d 1337 (Fla. 3d DCA 1991), *review denied*, 598 So. 2d 75 (Fla. 1992), stating that *ex parte* (i.e., from one side only) communications in quasi-judicial proceedings raise a presumption that the contact was prejudicial to the decision-making process; and s. 286.0115, F.S., enacted in response to the *Jennings* case, relating to access to local public officials in quasi-judicial proceedings.

Certain factual situations, however, have arisen where, in order to assure public access to the decision-making processes of public boards or commissions, it has been necessary to conclude that the presence of two individuals of the same board or commission is not necessary to trigger application of s. 286.011, F.S. As stated by the Supreme Court, the Sunshine Law is to be construed "so as to frustrate all evasive devices." *Town of Palm Beach v. Gradison*, 296 So. 2d 473, 477 (Fla. 1974).

a. Written correspondence between board members

The use of a written report by one commissioner to inform other commissioners of a subject which will be discussed at a public meeting is not a violation of the Sunshine Law if prior to the meeting, there is no interaction related to the report among the commissioners. In such cases, the report, which is subject to disclosure under the Public Records Act, is not being used as a substitute for action at a public meeting as there is no response from or interaction among the commissioners prior to the meeting. AGO 89-23. *And see*, AGO 01-20 (e-mail communication of factual background information from one city council member to another is a public record and should be maintained by the records custodian for public inspection and copying; however, such communication of information, when it does not result in the exchange of council members' comments or responses on subjects requiring council action, does not constitute a meeting subject to the Sunshine Law).

If, however, the report is circulated among board members for comments with such comments being provided to other members, there is interaction among the board members which is subject to s. 286.011, F.S. AGO 90-03. *See also*, AGO 96-35, stating that a school board member may prepare and circulate an informational memorandum or position paper to other board members; however, the use of a memorandum to solicit comments from other board members or the circulation of responsive memoranda by other board members would violate the Sunshine Law.

Thus, if a memorandum reflecting the views of a board member on a pending board issue is circulated among the board members with each indicating his or her approval or disapproval and, upon completion of the signatures, the memorandum has the effect of becoming the official action of the board, there is a violation of the Sunshine Law. *Inf. Op. to Blair*, June 29, 1973. *And see*, AGO 01-21, noting that a process whereby city council members distribute their own position papers to other council members is "problematical" and would violate the Sunshine Law to the extent that any such communication is a response to another council member's statement. Thus, the city council's discussions and deliberations on matters coming before the council must occur at a duly noticed city council meeting and the circulation of position statements must not be used to circumvent the requirements of the statute. *Id.*

Similarly, a board that is responsible for assessing the performance of its chief executive officer (CEO) should conduct the review and appraisal process in a proceeding open to the public as prescribed by s. 286.011, F.S., instead of using a review procedure in which individual board members evaluate the CEO's performance and send

their individual written comments to the board chairman for compilation and subsequent discussion with the CEO. AGO 93-90.

b. Telephone conversations and meetings

As discussed in this manual, the Sunshine Law applies to the deliberations and discussions between two or more members of a board or commission on some matter which foreseeably will come before that board or commission for action. The use of a telephone to conduct such discussions does not remove the conversation from the requirements of s. 286.011, F.S.

A related issue is whether a board is *authorized* to conduct its meetings through the use of a telephone conference call or other type of communications technology. In AGO 98-28, the Attorney General's Office concluded that s. 120.54(5)(b)2., F.S., authorizes *state* agencies to conduct meetings via electronic means provided that the board complies with uniform rules of procedure adopted by the state Administration Commission. These rules contain notice requirements and procedures for providing points of access for the public. See, Rule 28-109, F.A.C. Cf., s. 456.011(3), F.S. (licensing boards within the Department of Health must conduct meetings through teleconferencing or other technological means, except for certain disciplinary hearings or "controversial" rule hearings or unless otherwise approved in advance by the director of the Division of Medical Quality Assurance).

As to local boards, the Attorney General's Office has noted that the authorization in s. 120.54(5)(b)2., to conduct meetings entirely through the use of communications media technology applies only to state agencies. AGO 98-28. Thus, since s. 1001.372(2)(b), F.S., requires a district school board to hold its meetings at a "public place in the county," a quorum of the board must be physically present at the meeting of the school board. However, as long as a quorum of the board is physically present at the meeting site, the board may use electronic media technology to allow a physically absent member of the board to attend the meeting. *Id.*

Similarly, in AGO 92-44, a county commission was advised that the Sunshine Law would permit an ill county commissioner to participate and vote in commission meetings through use of an interactive video and telephone system that permitted her to see and hear the other members of the board and audience, provided that a legal quorum of the commission meet in a public place in the county, as required by statute. See *also*, AGO 94-55 (when a quorum of the board is physically present at the public meeting site in Florida, a museum board may allow an out-of-state member to participate and vote in board meetings by telephone; compliance with the requirements of s. 286.011, F.S., "would involve providing notice and access to the public at such meetings through the use of such devices as a speaker telephone that would allow the absent member to participate in discussions, to be heard by the other board members and the public and to hear discussions taking place during the meeting.").

c. Use of computers

The use of computers to conduct public business is becoming increasingly commonplace. While there is no provision generally prohibiting the use of computers to carry out public business, their use by members of a public board or commission to communicate among themselves on issues pending before the board, is subject to the Sunshine Law. AGO 89-39.

Thus, the use of an electronic newsletter to facilitate communication among the members of a public board or commission on matters that foreseeably may come before the body for official action would be subject to the Government in the Sunshine Law. Inf. Op. to Syrkus,

October 31, 2000. *Cf.*, Inf. Op. to Galaydick, October 19, 1995, advising that school board members may share a laptop computer even though the hard drive of the computer contains information reflecting the ideas of an individual member as long as the computer is not being used as a means of communication between members; and AGO 01-20 (a *one-way* e-mail communication from one city council member to another, when it does not result in the exchange of council members' comments or responses on subjects requiring council action, does not constitute a meeting subject to the Sunshine Law; however, such e-mail communications are public records and must be maintained by the records custodian for public inspection and copying).

Airport authority members may conduct informal discussions and workshops over the Internet, provided proper notice is given, and interactive access by members of the public is provided. AGO 01-66. Such interactive access must include not only public access via the Internet but also designated places within the authority boundaries where the airport authority makes computers with Internet access available to members of the public who may not otherwise have Internet access. *Id.* For meetings, however, where a quorum is necessary for action to be taken, physical presence of the members making up the quorum would be required in the absence of a statute providing otherwise. *Id.* Internet access to such meetings, however, may still be offered to provide greater public access. *Id.*

However, the use of an electronic bulletin board to discuss matters over an extended period of days or weeks, which does not permit the public to participate online, violates the Sunshine Law by circumventing the notice and access provisions of that law. AGO 02-32.

d. Delegation of authority

"The Sunshine Law does not provide for any 'government by delegation' exception; a public body cannot escape the application of the Sunshine Law by undertaking to delegate the conduct of public business through an alter ego." *IDS Properties, Inc. v. Town of Palm Beach*, 279 So. 2d 353, 359 (Fla. 4th DCA 1973), *certified question answered sub nom.*, *Town of Palm Beach v. Gradison*, 296 So. 2d 473 (Fla. 1974). *See also*, *News-Press Publishing Company, Inc. v. Carlson*, 410 So. 2d 546, 547-548 (Fla. 2d DCA 1982) (when public officials delegate de facto authority to act on their behalf in the formulation, preparation, and promulgation of plans on which foreseeable action will be taken by those public officials, those delegated that authority stand in the shoes of such public officials insofar as the Sunshine Law is concerned). *Cf.*, *Leach-Wells v. City of Bradenton*, 734 So. 2d 1168, 1171 (Fla. 2d DCA 1999) (committee charged with evaluating proposals violated the Sunshine Law when the city clerk unilaterally tallied the results of the committee members' individual written evaluations and ranked them; the court held that the "short-listing was formal action that was required to be taken at a public meeting").

Thus, this office has concluded that a single member of a board who has been delegated the authority to act on behalf of the board in negotiating a lease "is subject to the Sunshine Law and, therefore, cannot negotiate for such a lease in secret." AGO 74-294. A meeting between representatives of a private organization and a city commissioner appointed by the city commission to act on its behalf in considering the construction and funding of a cultural center and performing arts theater would also be subject to s. 286.011, F.S. AGO 84-54.

Similarly, when an individual member of a public board, or a board

member and the executive director of the board, conducts a hearing or investigatory proceeding on behalf of the entire board, the hearing or proceeding must be held in the sunshine. AGOs 75-41 and 74-84. *Cf., State, Department of Management Services v. Lewis*, 653 So. 2d 467 (Fla. 1st DCA 1995), stating that the issuance of an order of reconsideration by a board chair did not violate the Sunshine Law where the purpose of the order was to provide notice to the parties and allow them an opportunity to provide argument on the issue.

On the other hand, if a board member or designee has been authorized only to gather information or function as a fact-finder, the Sunshine Law does not apply. AGO 95-06. For example, if a member of a public board is authorized only to explore various contract proposals with the applicant selected for the position of executive director, with such proposals being related back to the governing body for consideration, the discussions between the board member and the applicant are not subject to the Sunshine Law. AGO 93-78.

If, however, the board member has been delegated the authority to reject certain options for further consideration by the entire board, the board member is performing a decision-making function that must be conducted in the sunshine. AGOs 95-06 and 93-78. For example, in AGO 90-17, this office stated that it is not a violation of the Sunshine Law for a city council member to meet with a private garbage contractor if the purpose of the meeting is essentially information gathering. But, if the board member has been authorized, formally or informally, to exercise any decision-making authority on behalf of the board, such as approving or rejecting certain contract provisions, the board member is acting on behalf of the board and the meetings are subject to s. 286.011, F.S.

Where a statute requires that the county commission approve a lease-purchase agreement, the commission's approval "must be made 'in the Sunshine.'" *Frankenmuth Mutual Insurance Company v. Magaha*, 769 So. 2d 1012, 1021 (Fla. 2000). *And see, Broward County v. Conner*, 660 So. 2d 288, 290 (Fla. 4th DCA 1995), *review denied*, 669 So. 2d 250 (Fla. 1996) (since Sunshine Law provides that actions of a public board are not valid unless they are made at an open public meeting, a county's attorneys would not be authorized to enter into a contract on the commission's behalf "without formal action by the county commission at a meeting as required by the statute"). *Compare, Lee County v. Pierpont*, 693 So. 2d 994 (Fla. 2d DCA 1997), *affirmed*, 710 So. 2d 958 (Fla. 1998) (authorization to county attorney to make settlement offers to landowners not to exceed appraised value plus 20%, rather than a specific dollar amount, did not violate the Sunshine Law).

It must be recognized, however, that the applicability of the Sunshine Law relates to the discussions of a single individual who has been delegated decision-making authority on behalf of a board or commission. If the individual, rather than the board, is vested by law, charter or ordinance with the authority to take action, such discussions are not subject to s. 286.011, F.S.

For example, in *City of Sunrise v. News and Sun-Sentinel Company*, 542 So. 2d 1354 (Fla. 4th DCA 1989), the court held that since the mayor was responsible under the city charter for disciplining city employees and since the mayor was not a board or commission and was not acting for a board, meetings between the mayor and a city employee concerning the employee's duties were not subject to s. 286.011, F.S.

e. Use of nonmembers as liaisons between board members

The Sunshine Law is applicable to meetings between a board member

and an individual who is not a member of the board when that individual is being used as a liaison between, or to conduct a de facto meeting of, board members. See, AGO 74-47 (city manager is not a member of the city council and thus, may meet with individual council members; however, the manager may not act as a liaison for board members by circulating information and thoughts of individual council members). *Compare*, AGO 89-39 (aides to county commissioners would not be subject to the Sunshine Law unless they have been delegated decision-making functions outside of the ambit of normal staff functions, are acting as liaisons between board members, or are acting in place of the board or its members at their direction).

For example, in *Blackford v. School Board of Orange County*, 375 So. 2d 578 (Fla. 5th DCA 1979), the court held that a series of scheduled successive meetings between the school superintendent and individual members of the school board were subject to the Sunshine Law. While normally meetings between the school superintendent and an individual school board member would not be subject to s. 286.011, F.S., these meetings were held in "rapid-fire succession" in order to avoid a public airing of a controversial redistricting problem. They amounted to a de facto meeting of the school board in violation of s. 286.011, F.S.

Similarly, in *Sentinel Communications Company v. School Board of Osceola County*, No. C192-0045 (Fla. 9th Cir. Ct. April 3, 1992), the court found that a series of private meetings between a school superintendent and individual school board members which were scheduled by the superintendent to present and consider staff recommendations concerning the administrative structure of the school system and to privately address any objections or concerns that the board might have, should have been held in the sunshine. The court said that its decision should not be construed to prohibit individual board members from meeting privately with staff or the superintendent for informational purposes or on an ad hoc basis. However, "[i]t shall be construed to prohibit the scheduling of a series of such meetings which concern a specific agenda." Thus, the court enjoined the board and its superintendent "from holding any further closed door meetings to formulate Board policy, discuss matters where Board action is contemplated, or otherwise conduct the public's business."

In *Citizens for a Better Royal Palm Beach, Inc. v. Village of Royal Palm Beach*, No. CL 91-14417 AA (Fla. 15th Cir. Ct. May 14, 1992), the court invalidated a contract for the sale of municipal property when it determined that after the proposal to sell the property which had been discussed and approved at a public meeting collapsed, the city manager met individually with council members and from those discussions the property was sold to another group. The circuit court found that these meetings resulted in a substantial change in the terms of sale and that the execution of the contract, therefore, violated the Sunshine Law.

Thus, a city manager should refrain from asking each commissioner to state his or her position on a specific matter which will foreseeably be considered by the commission at a public meeting in order to provide the information to the members of the commission. AGO 89-23. See *also*, AGO 75-59 (the spirit, if not the letter, of the Sunshine Law requires official decisions to be made in public after a full discussion by the board members; thus, the board's director should refrain from calling each member of the board separately and asking each member to state his or her position on a matter which will foreseeably be presented for consideration to the entire board in open session). *Cf.*, AGO 81-42 (the fact that a city council member has expressed his or her views or voting intent on an upcoming matter to a news reporter prior to the scheduled public meeting does not violate the Sunshine Law so long as the reporter is not being used by the member as an intermediary in order to circumvent the requirements of s. 286.011,

F.S.).

Not all decisions taken by staff, however, need to be made or approved by a board. Thus, the district court concluded in *Florida Parole and Probation Commission v. Thomas*, 364 So. 2d 480 (Fla. 1st DCA 1978), that the decision to appeal made by legal counsel to a public board after discussions between the legal staff and individual members of the board was not subject to the Sunshine Law. *Accord*, Inf. Op. to Biasco, July 2, 1997 (administrative officers or staff who serve public boards should not poll board members on issues which will foreseeably come before the board in order to avoid being used as a liaison between board members, although an administrative officer is not precluded from contacting individual board members for their views on a matter when the officer, and not the board, has been vested with the authority to take action).

[Home](#) | [My Florida](#) | [Commission on the Status of Women](#) | [Florida Elections Commission](#) | [Privacy Policy](#)
Copyright © 2003 State of Florida

Government-in-the-Sunshine Manual

Chapter updated: 02/14/2003

What is a public record which is open to inspection?

1. What materials are public records?

Section 119.011(1), F.S., defines "public records" to include:

all documents, papers, letters, maps, books, tapes, photographs, films, sound recordings, data processing software, or other material, regardless of the physical form, characteristics, or means of transmission, made or received pursuant to law or ordinance or in connection with the transaction of official business by any agency.

The Florida Supreme Court has interpreted this definition to encompass all materials made or received by an agency in connection with official business which are used to perpetuate, communicate or formalize knowledge. *Shevin v. Byron, Harless, Schaffer, Reid and Associates, Inc.*, 379 So. 2d 633, 640 (Fla. 1980). All such materials, regardless of whether they are in final form, are open for public inspection unless the Legislature has exempted them from disclosure. *Wait v. Florida Power & Light Company*, 372 So. 2d 420 (Fla. 1979).

The term "public record" is not limited to traditional written documents. As the statutory definition states, "tapes, photographs, films, sound recordings, data processing software, or other material, regardless of the physical form, characteristics, or means of transmission" can all constitute public records.

Clearly, as technology changes the means by which agencies communicate, manage, and store information, public records will take on increasingly different forms. Yet, the comprehensive scope of the term "public records" will continue to make the information open to inspection, unless exempted by law.

The broad definition of the term "public record" can be seen in numerous Attorney General Opinions and court decisions. The following are examples of materials which have been found to constitute public records:

Anonymous letters regarding school personnel which are received by the school district--AGO 87-48;

Computer tapes produced by a state commission that contain the names and addresses of subscribers to a magazine published by the agency--AGO 85-03;

Copies of letters or other documents received by citizens which are then given to the mayor in his official capacity--AGO 77-141;

Decisions or orders of the Unemployment Compensation Commission--AGO 81-15;

Engineering plans submitted to the Central and Southern Florida Flood Control District for review--AGO 74-245;

Reimbursement records showing amounts paid annually by state agency to Medicaid providers--AGO 80-31;

Salary records of assistant state attorneys--AGO 73-30;

Tape recording of incoming calls to a public agency--Inf. Op. to Stone, January 17, 1980;

Travel itineraries and plane reservations for use of state aircraft--AGO 72-356;

Videotaped training film--AGO 88-23.

The preceding discussion makes it clear that there is seldom any real debate as to whether information prepared or received by an agency is a public record; to the contrary, the real inquiry is usually whether there is any legislatively-created exemption which would make the public record confidential and not subject to disclosure. The complete text of Ch. 119, F.S., the Public Records Act, may be found in Appendix C of this manual.

Article I, s. 24, Fla. Const., establishes a constitutional right of access to any public record made or received in connection with the official business of any public body, officer, or employee of the state, or persons acting on their behalf, except those records exempted pursuant to Art. I, s. 24, Fla. Const., or specifically made confidential by the Constitution. See, *State ex rel. Clayton v. Board of Regents*, 635 So. 2d 937 (Fla. 1994) ("[O]ur Constitution requires that public officials must conduct public business in the open and that public records must be made available to all members of the public."). The complete text of Art. I, s. 24, Fla. Const., the Public Records and Meetings Amendment, may be found in Appendix A.

2. When are notes or nonfinal drafts of agency proposals subject to Ch. 119, F.S.?

There is no "unfinished business" exception to the public inspection and copying requirements of Ch. 119, F.S. If the purpose of a document prepared in connection with the official business of a public agency is to perpetuate, communicate, or formalize knowledge, then it is a public record regardless of whether it is in final form or the ultimate product of an agency. *Shevin v. Byron, Harless, Schaffer, Reid and Associates, Inc.*, 379 So. 2d 633 (Fla. 1980). "Inter-office memoranda and intra-office memoranda communicating information from one public employee to another or merely prepared for filing, even though not a part of an agency's later, formal public product, would nonetheless constitute public records inasmuch as they supply the final evidence of knowledge obtained in connection with the transaction of official business." 379 So. 2d at 640. Cf., *Gannett Corporation, Inc. v. Goldtrap*, 302 So. 2d 174 (Fla. 2d DCA 1974) (county's concern that premature disclosure of a report could be harmful to the county does not make the document confidential).

Accordingly, any agency document, however prepared, if circulated for review, comment or information, is a public record regardless of whether it is an official expression of policy or marked "preliminary" or "working draft" or similar label. Examples of such materials would include interoffice memoranda, preliminary drafts of agency rules or proposals which have been submitted for review to anyone within or outside the agency, and working drafts of reports which have been furnished to a supervisor for review or approval.

In each of these cases, the fact that the records are part of a preliminary process does not detract from their essential character as public records. See, *Times Publishing Company v. City of St.*

Petersburg, 558 So. 2d 487 (Fla. 2d DCA 1990) (while the mere preparation of documents for submission to a public body does not create public records, the documents can become public records when exhibited to public officials and revised as part of a bargaining process); *Booksmart Enterprises, Inc. v. Barnes & Noble College Bookstores, Inc.*, 718 So. 2d 227, 229 (Fla. 3d DCA 1998) (book selection forms completed by state university instructors and furnished to campus bookstore "are made in connection with official business, for memorialization and communication purposes[;] [t]hey are public records"); and AGO 91-26 (minutes of city council meetings are public records once minutes have been prepared by clerk even though minutes have not yet been sent to city council members and have not been officially approved by the city council). It follows then that such records are subject to disclosure unless the Legislature has specifically exempted the documents from inspection or has otherwise expressly acted to make the records confidential. See, for example, s. 119.07(3)(l), F.S., providing a limited work product exemption for agency attorneys.

However, "under chapter 119 public employees' notes to themselves which are designed for their own personal use in remembering certain things do not fall within the definition of 'public record.'" *The Justice Coalition v. The First District Court of Appeal Judicial Nominating Commission*, 832 So. 2d 185, 192 (Fla. 1st DCA 2002). In *Justice Coalition*, the First District held that personal handwritten notes made by members of a judicial nominating commission during the deliberation process "are not public record." *Id. Accord, Coleman v. Austin*, 521 So. 2d 247 (Fla. 1st DCA 1988), holding that preliminary handwritten notes prepared by agency attorneys and intended only for the attorneys' own personal use are not public records.

Nevertheless, so-called "personal" notes can constitute public records if they are intended to communicate, perpetuate or formalize knowledge of some type. See, e.g., *City of Pinellas Park, Florida v. Times Publishing Company*, No. 00-008234CI-19 (Fla. 6th Cir. Ct. January 3, 2001) (rejecting city's argument that employee responses to survey are "notes" which are not subject to disclosure because "as to each of the employees, their responses were prepared in connection with their official agency business and they were 'intended to perpetuate, communicate, or formalize knowledge' that they had about their department"); *Church of Scientology Flag Service Organization, Inc. v. Wood*, No. 97-688CI-07 (Fla. 6th Cir. Ct. February 27, 1997) (drafts and notes of an autopsy performed by the medical examiner are public records); *Florida Sugar Cane League v. Florida Department of Environmental Regulation*, No. 91-4218 (Fla. 2d Cir. Ct. June 5, 1992), stating that handwritten notes of agency staff, "utilized to communicate and formulate knowledge within [the agency], are public records subject to no exemption;" Inf. Op. to McLean, December 31, 1998, concluding that handwritten notes prepared by a council member regarding research on a matter under discussion by the council and used at a workshop meeting as a reference in discussing the member's position are public records; and Inf. Op. to Fulwider, June 14, 1993, stating that meeting notes that were prepared by a district negotiator to "memorialize" discussions which took place are being used to perpetuate the information contained therein; therefore, they are public records.

- I. Procedure Name: **Policy Numbering**
- II. Basic Procedure:

All policies should adhere to the following numbering procedure.

The standard operating procedure numbering begins with the year created. In the example below, 02 was created in 2002.

SOP#: 02

This is followed by the section number. The example below is from Section 01.

SOP#: 02-01

This is followed by a lower case letter indicating subsection. The example below is from subsection j.

SOP#: 02-01-j

This followed by an Arabic number indicating procedure within the subsection. The example below is procedure 1.

SOP#: 02-01-j1

Attachments are numbered numerically followed by the SOP#.

Example: Attachment #1
02-01-j1

- III. Contingencies/Variations:

None

- I. Procedure Name: **Cellular Telephone/Radio Issuance**
- II. Basic Procedure:

District employees' eligibility for issuance of a cellular radio/phone device (with either or both capabilities depending on the responsibilities of the individual employee) is determined by examination of their duties in relation to the District Cellular Communication Criteria listed below.

1. A District employee's communication requirements warrant issuance of a cellular radio/phone device with the appropriate capabilities if:
 - a) The employee (Educational Support Personnel) routinely requires in the field, real-time, voice communication with supervisors and peer employees to exchange/obtain information essential to efficient execution of duties and responsibilities (Example: a Maintenance Electrician with real-time radio communication requirements with supervisors and peer employees to exchange/obtain technical, mechanical, and operational information while on, or communicating with, a remote work site).
 - b) The employee (Director, Supervisory, and Professional Technical Personnel) routinely requires in the field, real-time, voice communication with supervisors, peer employees, and persons outside the District to exchange/obtain information essential to efficient execution of duties and responsibilities (Example: an Operations Director with real-time radio and telephony communication requirements with District employees and professional persons outside the district to exchange/obtain technical, mechanical, operational, and administrative information while on, or communicating with, a remote work site).
 - c) The employee (Superintendent and Senior Staff) routinely requires in the field, real-time, voice conferencing, call forwarding, voice mail, caller id, and other cellular capabilities with any combination of District employees and persons outside the District to exchange/obtain critical and time sensitive information essential to efficient execution of duties and responsibilities (Example: Senior Staff member with real-time radio and telephony communication requirements with District employees and persons outside the district to exchange/obtain critical and time sensitive information while on, or communicating with, a remote work site).

I. Procedure Name: Cellular Telephone/Radio Issuance

II. Basic Procedure: continued

2. Department directors will identify employees under their supervision whose communication requirements meet the District Cellular Communication Criteria. Department directors will then forward those names, the cellular services appropriate to each employee's duties, and the proposed funding source for the cellular services to their supervising Assistant Superintendent for consideration by the Superintendent. Upon approval of the Superintendent, the department directors will forward their cellular services requests to the Information Technology Department for processing with the Purchasing Office and with the current cellular vendor and for issuance of the cellular device. The receiving employee will be directed to the District Cellular Telephony and Radio Guidelines and the Guidelines for Acceptable Use of District Information Systems documents to review the acceptable procedures regarding use of District issued cellular devices. It is the responsibility of the supervising Directors to monitor employees that have been issued cellular devices for compliance with guidelines contained in the documents cited above. Failure of an employee to follow those guidelines will be reported by the supervising Director to the supervising Assistant Superintendent for consideration of possible disciplinary action by the Superintendent (including but not limited to monetary compensation to the District and nullification of the issuance of the employee's cellular device).
3. At the time the cellular device is issued, a Cellular Equipment Custody Form (Attachment #1) will be provided to the employee. Department directors shall ensure the Cellular Equipment Custody Form is completed and retained on file with the department.

Efficient and Ethical use of District Cellular Devices

All persons employed by the Escambia County School district, regardless of their particular job or role, have ethical responsibilities and obligations. Efficient and ethical use of District issued cellular devices are included in those responsibilities and are referenced in the Application of Code of Ethics; Improper Conduct; Unauthorized Use of District Facilities, Equipment, Supplies, and Materials section of the Escambia County School District Code of Ethics (see excerpt below).

- I. Procedure Name: **Cellular Telephone/Radio Issuance**
- II. Basic Procedure: continued

Unauthorized Use of District Facilities, Equipment, Supplies, and Materials

A School District employee shall not use nor allow others to use for non-District purposes, District equipment, supplies or material, nor engage in or allow conduct resulting in the unauthorized use of any District resource. Except for occasional and limited personal use that does not interfere with the performance of official duties or create an appearance of impropriety, a School District employee shall not use nor allow others to use District facilities, equipment, supplies or materials for personal purposes.

Employee responsibilities regarding efficient and ethical use of District issued cellular devices are also implicitly referenced in the Guidelines for Acceptable Use of District Information Systems document posted at <http://www.escambia.k12.fl.us/districtinfo.htm> .

- III. Contingencies/Variations:
 - 1. Blackberry service shall be authorized at the sole discretion of the Superintendent.
 - 2. Loss/Damage/Theft of Cellular Equipment – Department Directors shall ensure all reports of loss, damage, or theft are appropriately investigated. The Cellular Equipment Custody Form shall be completed for any replacement unit issued.

**REQUEST FOR WIRELESS DEVICE
 SERVICE TO BE PROVIDED BY DISTRICT**

Service Requested (Check One)

- New: No previous equipment or service
- Upgrade: Change in equipment or related services
- Disconnect: Cancellation of services
- Replacement: Lost, damage or stolen

Date of Request: _____ Department Name: _____ Cost Center #: _____

Applicant Name: _____ Applicant's Position: _____

Work Location Phone #: _____ Classification: _____
(Administrative/Professional/Instructional/Educational Support)

Budget account to be charged:

Company				Account				Center							
Fund		C/G	Object		Function		T/F	Project		Y	CC				
		5	3	0	3	7	3								

Item Requested
<input type="checkbox"/> Blackberry
<input type="checkbox"/> Cell Phone with Radio
<input type="checkbox"/> Radio only

Additional Service Requested
<input type="checkbox"/> Caller ID
<input type="checkbox"/> Voice Mail
<input type="checkbox"/> GPS

Identify the specific position responsibilities that justify this request: (Multiple answers are acceptable)

- ___ Immediate communication between staff and/or public agencies is required
- ___ Personal safety while conducting official ECSD business
- ___ Position requires communication, other than a traditional land line
- ___ Other: Explain: _____

Identify the percentage of work time spent out of the office: _____%

If requesting Blackberry, please document activities requiring this service: _____

District wireless devices will be issued based on position responsibilities. It is the expectation of the District that wireless devices will be used judiciously. District employees will limit cell phone usage; calls will be made on a conventional land line whenever possible if one is reasonable available. District owned wireless devices should only be used for official District business. Employees using District owned wireless devices will receive a copy of their monthly bill and must complete an audit sheet and reimburse the District for any personal use. The approving supervisor shall provide oversight of the use of the wireless device by reviewing billing documentation for usage and verifying reimbursement requirements. Employees terminating employment with the District or moving to other positions within the District must deliver any wireless device they have been issued to their supervisor prior to their final day.

Required Signatures:

Applicant: _____ Date: _____
 Supervisor: _____ Date: _____
 Assistant Superintendent: _____ Date: _____
 Superintendent/Deputy Superintendent: _____ Date: _____

I. Procedure Name: **Cellular Telephone/Radio Personal Use Billing Reconciliation and District Reimbursement**

II. Basic Procedure:

Any employee issued cellular equipment will be directed to the District Cellular Telephony and Radio Guidelines and the Guidelines for Acceptable Use of District Information Systems documents to review the acceptable procedures regarding use of District issued cellular devices. It is the responsibility of the supervising Directors to monitor employees that have been issued cellular devices for compliance with guidelines contained in the documents cited above. Failure of an employee to follow those guidelines will be reported by the supervising Director to the supervising Assistant Superintendent for consideration of possible disciplinary action by the Superintendent (including but limited to monetary compensation to the District and nullification of the issuance of the employee's cellular device).

Employees are expected to abide Rules and Procedures of the District School Board 6Gx17-5.04(6)(c)(3),(4) which state:

Efficient and ethical use of District Cellular Devices

All persons employed by the Escambia County School District, regardless of their particular job or role, have ethical responsibilities and obligations. Efficient and ethical use of District issued cellular devices are included in those responsibilities and are referenced in the Application of Code of Ethics; Improper Conduct; Unauthorized Use of District Facilities, Equipment, Supplies, and Materials section of The Escambia County School District Employee Code of Ethics (see excerpt below).

Unauthorized use of District Facilities, Equipment, Supplies, and Materials

A School District employee shall not use nor allow others to use for non-District purposes, District equipment, supplies or material, nor engage in or allow conduct resulting in the unauthorized use of any District resource. Except for occasional and limited personal use that does not interfere with the performance of official duties or create an appearance of impropriety, a School District employee shall not use nor allow others to use District facilities, equipment, supplies or materials for personal purposes.

I. Procedure Name: **Cellular Telephone/Radio Personal Use Billing Reconciliation and District Reimbursement**

II. Basic Procedure: continued

Employee responsibilities regarding efficient and ethical use of District issued cellular devices are also implicitly referenced in the Guidelines for Acceptable Use of District Information Systems document posted at <http://www.escambia.k12.fl.us/districtinfo.htm> .

The following procedure shall be used to ensure billing reconciliation, reimbursement and that IRS substantiation requirements are met when an employee uses an issued cellular device:

1. The Director Management Information Systems (MIS) shall review all monthly billing statements for service related issues each month. The Director of MIS shall then provide Accounts Payable copies of the monthly billing statements for all employees issued cellular devices within 5 working days of receipt.
2. Accounts Payable shall sort statements by department and shall distribute the sorted statements via courier to each department.
3. Department Heads/Supervisors shall distribute statements to each employee issued a cellular device within their department each month.
4. Every employee issued a cellular device shall review their monthly billing statement and shall:
 - a. Highlight each outgoing and incoming telephone call deemed to have been of a personal nature.
 - b. Total all service minutes for every highlighted call and, using a pen, record that total on the Cell Phone Reimbursement Form (Attachment #1) in the My Personal Minutes box.
 - c. Multiply the total personal use minutes by the service reimbursement rate of \$0.08/minute and, using a pen record the total reimbursement requirement on the Cell Phone Reimbursement Form (Attachment #1) in the Amount Owed for Personal Minutes box.

- I. Procedure Name: **Cellular Telephone/Radio Personal Use Billing Reconciliation and District Reimbursement**
- II. Basic Procedure: continued
 - d. If the cost of the total personal use is \$1.00 or more, write a check for the total amount payable to the Escambia County School District.
 - e. Complete all remaining sections of the Cell Phone Reimbursement Form (Attachment #1) with the required signatures, dates and certifications.
 - f. Return the Cell Phone Reimbursement Form (Attachment #1), monthly billing statement and any required check to the Department Director/supervisor within 10 days of receipt of each monthly statement.
5. The Department Head/Supervisor shall:
 - a. Review, sign and date each Cell Phone Reimbursement Form (Attachment #1).
 - b. Provide the coding the cell phone is charged to in the coding box on the Cell Phone Reimbursement Form (Attachment #1).
 - c. Remit a copy of all Cell Phone Reimbursement Forms (Attachment #1) with attached checks to the Revenue Department in one packet for the period. Copies of forms which do not require payment should not be sent.
 - d. Maintain a file for each cell phone user in his/her department. The file shall be comprised of:
 - Completed Request of Issuance
 - Monthly Cell Phone Reimbursement Form
 - Monthly Billing Statement
6. Every Department Director/Supervisor shall ensure employees with cellular devices within their departments comply with this procedure and shall periodically audit the submitted statements of their employees for accuracy.

- I. Procedure Name: **Cellular Telephone/Radio Personal Use Billing Reconciliation and District Reimbursement**
- II. Basic Procedure: continued
 7. Department Director/Supervisor shall report any instance of suspected cellular service fraud, waste, or abuse to their respective Assistant Superintendent immediately
- III. Contingencies/Variations:
 1. None

CELL PHONE REIMBURSEMENT

To: Revenue Department
From: _____
Date: _____
Re: Monthly Billing Statement for Cellular Telephone/BlackBerry Service from _____

Each employee assigned a district cell phone is responsible for reimbursing the District for any personal calls made or received which in total are \$1.00 or more for the period.

My Personal Minutes	
Cost Per Minute <i>(The current reimbursement cost per minute will be \$0.08. Updates will be made if there are increases in the cost from the provider.)</i>	\$0.08
Amount Owed for Personal Minutes <i>(Multiply personal minutes by cost per minute)</i>	

If the total amount owed is less than \$1.00, a check will not be necessary.

Coding for phone:

Fund	Account	Center

Please check the appropriate box:

- I have reviewed my billing statement and the amount owed for personal minutes is not in excess of \$1.00.

SIGNATURE

DATE

- I have reviewed my billing statement and enclosed a check made payable to the Escambia County School District for personal calls made on this statement.

SIGNATURE

DATE

Department Head/Supervisor:

- I have reviewed the user's documents.

08-01-e15
Attachment #1

SIGNATURE

DATE

I. Procedure Name: **Leave Requests**

II. Basic Procedure:

1. A Leave Request Form is to be utilized by all employees requesting leave. The form consists of three copies on NCR paper. This form must be completed at the time the employee requests leave. The completed form is sent to the department for the employee's signature. When the signed leave form is returned, it is forwarded to the Department Head for approval. (Attachment #1)
2. Complete a Temporary Leave Request form (Attachment #2) on any employee that has not signed his/her leave slip. Separate the original from the copy after it has been approved by the Department Head. The copy is kept in the department files. Once the original is signed, it is included with the other leave slips that go to the Payroll Department.

III. Contingencies/Variations:

None

Standard Operating Procedure: **Payroll**

Author: Purchasing

Department: **Operations Division**

Issue Date:

SOP #: **02-01-f2**

Rev. Date:

- I. Procedure Name: **Payroll Post (TERMS)**
- II. Basic Procedure: **Key Instructions**

This section is available for review in the office copy of the Policies and Procedures Manual.

Standard Operating Procedure: **Administration**

Author: TAK
Issue Date: 3/27/03
Rev. Date:

Department: **Operations Division**
SOP #: **03-01-f3**

- I. Procedure Name: **Extra Pay Instructions**
- II. Basic Procedure:

Extra pay instructions and the completion of the extra pay log are provided by the District's Payroll Department. The procedure for extra pay is contained in Standard Accounting Procedure (SAP) 201. The extra log procedure is found in SAP 202.

Attachment #1 is SAP 201 and 202 issued March 1, 2003.

- III. Contingencies/Variations:

None

ECSD ADMINISTRATIVE PROCEDURES – PAYROLL DEPARTMENT			
NUMBER	TITLE	EFFECTIVE DATE	REV
SAP 201	Extra Pay – All Personnel	January 24, 2000	2003

1. **Purpose:** This procedure provides the guidelines to be used in paying extra pay.
2. **Scope:** This procedure applies to the payment of all District personnel.
3. **General:** The definition of extra pay is work performed beyond employee’s regular assigned duties.
 - No extra pay is to be reported to the payroll department until after the work is performed. Florida Statute 1011.60(3)(c) states: “No salary payment shall be paid to any employee in advance of service being rendered.” Reporting of dates beyond the due date of the time sheet is in violation of Florida State Statute.
 - Extra Pay Time sheets are due in the payroll office no later than as follows
 - Instructional: the first of the month following the month in which work was performed.
 - Educational Support: the first Monday following the normal payday (Friday)

Time sheets not received by the due date will be processed on the subsequent payroll.
 - Do not accumulate extra-pay for multiple pay periods. Submit all extra-pay as soon as the work is completed.
 - All extra pay must be reported on a yellow extra pay time sheet, which is available by contacting the payroll department, or via the Payroll Department website. Extra pay may not be processed through the TERMS payroll system.
 - Information reported on an extra-pay timesheet must be supported with documentation maintained by the school or department. A log sheet may be obtained from the payroll department. If you use your own form, it must provide the following information:
 1. Name of employee
 2. Social Security Number
 3. School/Department
 4. Description of activity or work performed.
 5. Date work was performed. A separate line must be used to report each date.
 6. Starting and ending time of work performed for a specific date.
 7. Hours worked for a specific date.
 8. Employee signature verifying the time to be reported on timesheet.
 9. Principal or Department Head Signature
 10. Date signed.

ECSD ADMINISTRATIVE PROCEDURES – PAYROLL DEPARTMENT

4. Preparation of Extra Pay Time Sheet:

Circle the appropriate employee classification. The School/Department must be completed to identify the responsible cost center submitting the time sheet. The Activity must also be completed to identify the name of the workshop or the specific work performed. Complete all other parts as follows:

4.1 Work Location: Work location of permanent job.

4.2 Name: Name of employee to be paid.

4.3 Social Security: Social Security Number of employee.

4.4 Date(s) Worked: Complete as follows:

Instructional Personnel: The specific date or dates additional hours were worked.

Educational Support Personnel: The specific date or dates additional hours were worked. Dates reported should be for a one- week period only (Monday thru Sunday). Payroll personnel must calculate overtime in accordance with the Fair Labor Standards Act and Master Contract provisions. A separate line should be used for each week reported.

4.5 Time Start/Time End: Enter the time work started and the time work ended.

4.6 Hours Worked: Complete as follows:

Instructional Personnel: The hours to be paid for a specific date or dates additional work was performed.

Educational Support Personnel: Hours to be paid for a specific date or dates work was performed. Enter the hours worked for one week only (Monday thru Sunday). Payroll personnel must calculate overtime in accordance with the Fair Labor Standards Act and Master Contract provisions. A separate line should be used for each week reported.

4.7 Rate of Pay: Rate to be paid for this job.

4.8 Total: Leave blank – payroll will complete this field.

4.9 Fund, Function, Object, Cost Center, Project: General ledger coding for this activity. Person responsible for the activity must know funding source before authorizing the activity.

4.10 Principal or Dept. Head Signature: Must have signature of responsible person who is on authorized signature sheet before time sheet can be processed.

4.11 Date: Date signed.

ECSD ADMINISTRATIVE PROCEDURES – PAYROLL DEPARTMENT

4.12 Phone Number: Phone number of responsible person who is authorized to approve timesheet.

5 Contacts: For clarification of any issues regarding Educational Support Personnel extra pay call either of the following numbers: 469-6276 or 469-6198.

ECSD ADMINISTRATIVE PROCEDURES – PAYROLL DEPARTMENT			
NUMBER	TITLE	EFFECTIVE DATE	REV
SAP 202	Extra Pay Log	March 1, 2003	2003

1. **Purpose:** This procedure provides the guidelines to be used in documenting information reported on an Extra-Pay Timesheet.

2. **Scope:** This procedure applies to the payment of all personnel.

3. **General:** The definition of extra pay is work performed beyond employee's regular assigned duties.

- It is the responsibility of each work site to keep a detailed report or log on each individual's extra-pay time.
- The extra pay log is a form to be used as support documentation for the extra-pay timesheet. It should be retained at the school or department submitting the extra-pay timesheet. Do not send this form to payroll.
- The information provided on the log or other supporting documentation is subject to audit.
- If you do not use the extra-pay log, and use another form of documentation, it must provide the following information:
 1. Name of employee
 2. Social Security Number
 3. School/Department
 4. Description of activity or work performed, such as attendance at workshop, detention duty, community school, etc.
 5. Date work was performed. This should be reported for a specific date, such as September 19th. Do not report multiple dates together (Sept 19th thru Sept 25th). Each date work was performed must be reported separately on the support documentation.
 6. Starting and ending time of work performed for a specific date.
 7. Hours worked for a specific date.
 8. Employee signature verifying the accuracy of information to be reported on an extra-pay timesheet.
 9. Principal or Department Head Signature
 10. Date signed.

4. **Preparation of Extra Pay Log:**

4.1 **Name:** Name of employee to be paid.

4.2 **Social Security:** Social Security Number of employee

ECSD ADMINISTRATIVE PROCEDURES – PAYROLL DEPARTMENT

- 4.3 **School/Department:** Responsible cost center.
- 4.4 **Description of Activity/Work Performed:** This must be completed and should identify the specific work performed, such as tutoring, or activity, such as workshop.
- 4.5 **Date:** The specific date additional hours were worked.
- 4.6 **Start Time/End Time:** Enter the time work started and the time work ended.
- 4.7 **Hours:** Hours to be paid for a specific date.
- 4.8 **Employee Signature:** Employee signature required for verification of time to be reported on extra-pay timesheet.
- 4.9 **Principal or Dept. Head Signature:** Must have signature of responsible person who is on authorized signature sheet before time sheet can be processed.
- 4.10 **Date:** Date signed.

- 5 **Contacts:** For clarification of any issues regarding the instructions for this form, please contact the Payroll Department.

Standard Operating Procedure: **Purchasing**

Author: MRP

Department: **Operations Division**

Issue Date:

SOP #: **02-01-g1**

Rev. Date:

- I. Procedure Name: **DBS Purchasing System**
- II. Basic Procedure: **Signing On to System**

This section is available for review in the office copy of the Policies and Procedures Manual.

Standard Operating Procedure: **Purchasing**

Author: MRP

Department: **Operations Division**

Issue Date:

SOP #: **02-01-g2**

Rev. Date:

I. Procedure Name: Warehouse Requisitions

II. Basic Procedure:

This section is available for review in the office copy of the Policies and Procedures Manual.

SCHOOL _____ DATE _____
DEPARTMENT _____
WORK ORDER NO. _____ REQUISITION _____

NO.	ITEM NO.	DESCRIPTION/IDENTIFICATION	USE/TYPE

I. Procedure Name: Software Acquisition

II. Basic Procedure:

1. Department identifies need and budget for software acquisition.
2. Organize a core committee. The Department and Information Technology to establish committee framework. A project manager should be named for the project.
3. The acquisition process begins with the establishment of a selection committee. This committee is a broad based group of end users and support staff. At a minimum this group would be composed of purchasing, data processing and representatives of users of this system.
4. The committee should develop an acquisition timeline early in the process. This timeline should include the advertisement of meetings that are subject to the open meeting law. Include installation training and on-site consultant schedule in timeline. This timeline should also allow sufficient time for the General Counsel to review the legal matters associated with this purchase.
5. The committee should develop a detailed list of system requirements. These requirements should address both hardware requirements and software features. Flow chart to document the current process.
6. Once the software requirements are identified, a script should be developed that highlights the key requirements of the software. This script is to be used by vendors in demonstrating their software. The script should be used by the committee to develop a tally sheet that the committee will use to evaluate the vendors effectiveness in demonstrating the features of the software.
7. Software vendors will be invited to demonstrate their software to the committee. This demonstration should include a general overview of the software followed by use of the script to guide the rest of the demonstration. Questions should be discouraged until the demonstration is complete. Participants must attend all demonstrations in order to vote. Confirm vendor received the script. All vendors must follow the script. Committee should consider questions common to all vendors but not share with vendors prior to demonstration.

Continued...

I. Procedure Name: Software Acquisition

II. Basic Procedure: continued

8. Once the demonstrations are complete, the committee will convene to rank the vendors. A process similar to the interview process should be used to assist the committee in reaching consensus on their rankings.
9. The rankings are forwarded to the Superintendent. Once the Superintendent has approved the rankings, the Director of Purchasing should be contacted to negotiate a final price from the vendor.

The final negotiation should include primary user department and Information Technology to finalize any system modifications including the data exchange interfaces necessary to send data to, and receive data from, other district information systems. Final hardware specifications to be reviewed and approved by the software vendor, Information Technology and the hardware vendor.

10. Site visit to top ranked firms is arranged. Preferably visits to multiple users of the software.
11. A contract from the vendor should be secured and forwarded to General Counsel.
12. Once the final price is agreed upon and the General Counsel has approved the contract, the item is placed on the School Board agenda.
13. Vendor should review implementation schedule and suggest changes. Pilot efforts to thoroughly test each element of the system. Elementary school, middle school, high school and special centers should be represented. Preference would be to have a pilot run during school year. Pilot group will review and refine user instructions. Extra personnel may be required during the pilot period.
14. Hardware installation checklist should be developed to insure all necessary applications and peripheral applications (Acrobat Reader, Microsoft Office, etc.) are installed. Consideration should be given to a standard desktop configuration.
15. Consideration should be given to training by homogenous groups. Develop a script for training participants to go back to their site and input data. This will test the flow of data through the system. **Continued...**

I. Procedure Name: **Software Acquisition**

II. Basic Procedure: continued

16. Procedures for the handling of trouble calls should be developed and distributed to all users.

III. Contingencies/Variations:

All users of the current system should be made aware of changes in the new system. Software vendors can be invited to participate by way of a Request for Information/Proposal or by invitation based on market share, use by other districts in Florida, etc.

Demonstrations may be scheduled for the Board if appropriate.

If negotiations cannot be successfully concluded with the first vendor, the selection committee should be reconvened to consider negotiations with the second ranked vendor or to begin selection process anew.

Standard Operating Procedure: **Property Control and Accounting**

Author: MRP

Department: **Operations Division**

Issue Date: 06/01/95

SOP #: **02-01-h1**

Rev. Date: 12/16/02

I. Procedure Name: **General**

II. Basic Procedure:

Each employee has the responsibility of not disposing of any School District property without notifying the appropriate Supervisor. The Supervisor will contact the Department Head's Administrative Secretary who will have the responsibility to fill out the proper forms for disposal or transfer of any item belonging to the School District.

III. Contingencies/Variations:

None

Standard Operating Procedure: **Property Control and Accounting**

Author: WJG

Department: **Operations Division**

Issue Date: 06/01/95

SOP #: **02-01-h2**

Rev. Date: 1/23/08

- I. Procedure Name: **Surplus Property (Non-Vehicle)**
- II. Basic Procedure:

The purpose of non-vehicle surplus property processing is to provide accountable and traceable instructions for the movement of surplus property from schools/departments to Maintenance or Central Warehouse.

Attachments:

1. Equipment Transfer/Disposal Form (ET&DF)
2. Standing Surplus Disposition List Sample
3. Equipment Transfer/Disposal Form for Auction/Scrap
4. Equipment Transfer/Disposal Form for Reissue, Transfer to Maintenance
5. Equipment Transfer/Disposal Form for Reissue at a later date

Upon determination by a school or department that an item is excess:

1. An equipment/disposal form (ET&DF) will be initiated. Initiator keeps the gold copy and forwards the form to Budgeting.
2. Budgeting will process the form, verifying Property Numbers and sources of acquisition. Any Property Numbered item that is on an inventory will be annotated with a "CO". Exception sources of acquisition such as "VOE" – Vocational Education, "FEDVOE" – Federal Vocational Education, and "CHAPT 1" – Chapter One, will be annotated to the right of the item. The white form will be retained and the remainder of the form will be sent to Central Warehouse, Shipping and Receiving Manager.
3. Shipping and Receiving Manager will review the forms for disposition direction. If the item is not on written disposition order lists from cognizant departments such as Maintenance or MIS, he will either forward the yellow "Receiver" copy to the appropriate department or contact them for disposition and annotate the ET&DF as appropriate. He will notify the appropriate department to make equipment ready for pickup such as copiers, etc.
4. For items which are not on standing disposition lists, the cognizant department will review the yellow ET&DF copy to process and annotate the copy as follows:

Continued...

Standard Operating Procedure: **Property Control and Accounting**

Author: WJG

Department: **Operations Division**

Issue Date: 06/01/95

SOP #: **02-01-h2**

Rev. Date: 1/23/08

I. Procedure Name: **Surplus Property (Non-Vehicle)**

II. Basic Procedure: **Continued**

- a. Auction/Scrap – yellow ET&DF copy will be noted with auction/scrap by the reviewing authority and returned directly to the Receiving and Shipping Manager. It will be attached to the ET&DF for review by the Surplus Manager. Upon pickup of the item, the Surplus Manager will make a final disposition based on historic auction sales and/or discussions with the District's Auctioneer to determine salability.
- b. Re-Issue/Transfer – this is to redirect the transfer of the item(s) from the location of the original request of a school or department to surplus for temporary hold or to a cognizant department for re-use. The reviewing authority will annotate the yellow copy with specific instructions and return to the Shipping and Receiving Manager. If the requestor wants all the items on the form, the Shipping and Receiving Manager will change the ET&DF Receiving School/Department block to reflect the new requestor name and cost center, and circle it so that Budgeting will notice the change. If the requestor wants only some of the items on the form, the Shipping and Receiving Manager will fill out a new ET&DF from the Warehouse to the Requestor and attach to the previous ET&DF. After pickup of the items from the original ET&DF signed for receipt and return the forms to the Warehouse. The Surplus Manager will ensure that the pertinent copies of both sets of ET&DF's, if applicable, are forwarded to Budgeting and retained for Warehouse records.
- c. Reissue at a later date – Procedures are identical to paragraph 4.b. above including pick up instructions, with one exception: the requestor will indicate to the Warehouse in writing to store for later transfer. The material will be picked up and stored at a Warehouse site under the cost code of the requestor. A copy of the ET&DF annotated with the location will be provided to the requestor for use in future annual inventories and a copy affixed to the equipment. Any such property held at a Warehouse site will be periodically reviewed with the requestor to determine continued need.

Continued...

Standard Operating Procedure: **Property Control and Accounting**

Author: WJG

Department: **Operations Division**

Issue Date: 06/01/95

SOP #: **02-01-h2**

Rev. Date: 1/23/08

I. Procedure Name: **Surplus Property (Non-Vehicle)**

II. Basic Procedure: **Continued**

d. Cannibalization and scrap – procedures are identical to paragraph 4.b. above with the added requirement that the requestor will add the item to a scrap request list to be sent to the School Board via Budgeting.

e. All District employees are prohibited from participating in the sale of surplus property. This includes attending auctions as well as purchasing any items the District has placed for sale in the auctions.

III. Contingencies/Variations:

None

Standard Operating Procedure: **Property Control and Accounting**

THE SCHOOL DISTRICT OF ESCAMBIA COUNTY Department of Property Accounting 51 E Texas Dr. Pensacola, FL 32503 Phone: 452-5443			EQUIPMENT TRANSFER/DISPOSAL FORM		
INSTRUCTIONS:					
Issuing School/Dept PETERSON ELEMENTARY SCHOOL		Cost Center # 2032	Move Order # 47604		
Receiving School/Dept WAREHOUSE		Cost Center # 5004	INTERNAL USE ONLY		
			Log Date _____	Date Completed _____	
PROPERTY NUMBER	QTY	ITEM DESCRIPTION	ACC. TYPE	FINAL DISPOSITION MAINTENANCE ACTION	TOTAL \$ VALUE
4296210	1	SAVIN COPIER		AUCTION <i>B.C. Henry</i> 8-7-03	
1234567	1	CHAINSAW		AUCTION <i>J. Thomas</i> 8-8-03	
TOTAL					
Signature <i>Peterson</i>		Issuing Principal/Dept Head		Date Issued <i>8-6-03</i>	
Driver Signature		Driver Name		Date Picked Up	
Signature		Receiving Principal/Dept Head		Date Delivered	
800-368-8881 Rev. 28 Aug 03		PROPERTY CONTROL COPY			

Attachment #1
02-01-h2

Standard Operating Procedure: **Property Control and Accounting**

PROPERTY NUMBER			QTY	ITEM DESCRIPTION	ACQ. TYPE	FINAL DISPOSITION MAINTENANCE ACTION	TOTAL \$ VALUE	
4296210			1	SAVIN COPTER		SCRAP <i>BC denny</i>	8703	
1234567			1	CHAINSAW		SCRAP <i>J. Thomas</i>	8803	
							TOTAL	8-6-03

Signature: <i>Peterson</i>	Issuing Principal/Dept Head	Date Issued: 8-6-03
Driver Signature	Driver Name	Date Picked Up
Signature	Receiving Principal/Dept Head	Date Delivered

PROPERTY CONTROL COPY

Attachment #2
02-01-h2

Standard Operating Procedure: **Property Control and Accounting**

PROPERTY NUMBER			QTY	ITEM DESCRIPTION	ACQ. TYPE	FINAL DISPOSITION / MAINTENANCE ACTION	TOTAL \$ VALUE
4296210			1	SAVIN COPIER			
				REFERENCE MOVE ORDER 47603			
				P/U BY MAINTENANCE			
				OR			
				DELIVER TO MAINTENANCE			
TOTAL							
Signature: <i>Joe Shop</i>			Issuing Principal/Dept Head			Date Issued: <i>8-6-03</i>	
Driver Signature			Driver Name			Date Picked Up	
Signature			Receiving Principal/Dept Head			Date Delivered	

Attachment #3
02-01-h2

Standard Operating Procedure: **Property Control and Accounting**

PROPERTY NUMBER		QTY	ITEM DESCRIPTION	ACC. TYPE	FINAL DISPOSITION/ MAINTENANCE ACTION	TOTAL \$ VALUE
4296210	1		SAYIN COPIER		CANNIBALIZE & SCRAP <i>BC King 8-7-03</i>	
1234567	1		CHAINSAW		AUCTION <i>J Thomas 8-8-03</i>	
			REFERENCE MOVE ORDER 47602			
			P/U BY MAINTENANCE			
			OR			
			DELIVER TO MAINTENANCE			
TOTAL						
<i>Peterson</i>						<i>8-16-03</i>
Signature				Issuing Principal/Dept Head		Date Issued
Driver Signature				Driver Name		Date Picked Up
Signature				Receiving Principal/Dept Head		Date Delivered

482-9846-008 Rev 01 Aug 93

PROPERTY CONTROL COPY

Attachment #4
02-01-h2

I. Procedure Name: Travel Authorization

II. Basic Procedure:

The Superintendent is the designated representative of the School Board to authorize and approve payment of all travel. These functions may be performed by one or more of the Deputy or Assistant Superintendents or the Superintendent's designated Administrative Assistant at the direction of the Superintendent.

Uniform travel authorization request forms shall be used by all School Board officers, employees, and authorized persons when requesting approval for travel. The form shall include, but not be limited to, provision for the name of each traveler, purpose of travel, period of travel and estimated cost of the trip. Such form shall be completed and signed by the traveler. Authorization or approval of travel shall not be given unless accompanied by the signature of the traveler's supervisor prior to submission to the Superintendent or designee.

The purpose of such travel shall be stated on the travel form. Authorization and approval of travel expenses shall be limited to those expenses necessarily incurred by the traveler in the performance of a public purpose authorized by law. A copy of the program or agenda of any convention or conference, itemizing all estimated costs (including any registration fees and any meals or lodging included in the registration fee) shall be attached to and filed with the copy of the travel authorization request form on file with the School Board. The form shall be properly executed as to signature requirements. The travel authorization form shall be attached to and become a part of the support of the School Board's copy of the travel voucher.

Travel by School Board officers or employees serving temporarily in behalf of another agency or partly in behalf of more than one agency at the same time or authorized persons who are called upon to contribute time and services as consultants or advisors, may be authorized by the Superintendent. A complete explanation and justification for the travel shall be stated on the travel expense voucher or attached thereto. (See Attachment #1)

III. Contingencies/Variations:

None

Standard Operating Procedure: Travel

THE SCHOOL DISTRICT OF ESCAMBIA COUNTY
REQUEST FOR TRAVEL AUTHORIZATION

Form T(2)
WHITE PAPER

Name: _____ Social Security #: _____ Date: _____
 Home Address: _____ Dept/School: _____
 City/State/Zip: _____ Title: _____

SECTION 1 - Destination and Purpose of Trip:

From: _____ To: _____ and return.
 Purpose: _____
 To Depart: _____ at _____ am / pm and Return: _____ at _____ am / pm
(Date) (Time) (Date) (Time)

SECTION 2 - Method of Travel: (check only the applicable methods to be used)

- Flying: Name of Airline: _____ Ticket Cost: \$ _____
 Personal Vehicle: Estimated Mileage _____ at \$0.29 per mile = \$ _____
 Name of Passengers in Vehicle: _____
 Rental Vehicle: Cost \$ _____ Driver's Name: _____ Passenger's Names: _____
 Other: _____ Estimated Cost: \$ _____

SECTION 3 - Estimated Subsistence (check one)

- Per Diem: \$ _____
 Meals plus lodging: Traveler will be staying at (hotel name, family, friend, etc.): _____
 Meals \$ _____ Estimated Lodging \$ _____ Room shared with (list names): _____

SECTION 4 - Other Estimated Expenses:

1. Registration \$ _____ 2. Taxi/Shuttle \$ _____ 3. Parking \$ _____
 4. Tolls \$ _____ 5. _____ \$ _____ 6. _____ \$ _____

SECTION 5 - Summary of Estimated Expenses to be Incurred:

Expenses		Funding Sources	
Travel (Section 2 Total)	\$ _____	District Funds	\$ _____
Subsistence (Section 3 Total)	\$ _____	School Internal Funds	\$ _____
Other (Section 4 Total)	\$ _____	Other Sources	\$ _____
Total	\$ _____	Total	\$ _____

I hereby request authorization to perform the travel herein described and attest that such travel is necessary in the service of official business for the School District of Escambia County. An approved Temporary Duty Leave Form has been completed.

Budget Account to be Charged:

Company				Account				Center			
Fund(4)	ORG(2)	Object(4)	Function(4)	DF(1)	Project(4)	Yr(1)	CC(4)				

Traveler's Signature: _____

Supervisor's Approval:	Finance Department Approval:	Superintendent's Approval
Date: _____	Date: _____	Date: _____
Signature: _____	Signature: _____	Signature: _____

I. Procedure Name: **Official Headquarters**

II. Basic Procedure:

The official headquarters of a School Board Officer or employee assigned to an office shall be the city, town or area in which the office is located, provided that, in all cases, such official headquarters must be in the best interests of the School Board and not for the convenience of the officer or employee.

III. Contingencies/Variations:

None

I. Procedure Name: Computation of Travel for Reimbursement

II. Basic Procedure:

- A. The travel day for Class "A" travel shall be a calendar day (midnight to midnight).
- B. The travel day for Class "B" travel shall begin at the same time as the travel period.
- C. For Class "A" and Class "B" travel, the traveler shall be reimbursed one-fourth of the authorized rate of per diem for each quarter, or fraction thereof, of the travel day included within his travel period. Class "A" and Class "B" travel shall include any assignment on official business outside of regular office hours and away from regular places of employment when it is considered reasonable and necessary to stay overnight and for which travel expenses are approved.
- D. A traveler shall not be reimbursed on a per diem basis for Class "C" travel but shall receive subsistence as provided in this section, which allowance for meals shall be based on the following schedule:
 - 1. Breakfast: When travel begins before 6 a.m. and extends beyond 8a.m.
 - 2. Lunch: When travel begins before 12 noon and extends beyond 2 p.m.
 - 3. Dinner: When travel begins before 6 p.m. and extends beyond 8 p.m., or when travel occurs during nighttime hours due to special assignment.
- E. No allowance shall be made for meals when travel is confined to the city or town of the official headquarters or immediate vicinity except assignments of official business outside of the traveler's regular place of employment if travel expenses are approved.

III. Contingencies/Variations:

None

I. Procedure Name: Rates of Per Diem and Subsistence Allowance

II. Basic Procedure:

Maximum rates of per diem and subsistence allowances shall be in accordance with the latest currently approved rates set forth in the Florida Statutes. However, rates less than the authorized maximum may be authorized and approved.

III. Contingencies/Variations:

None

I. Procedure Name: Transportation

II. Basic Procedure:

All travel must be by a usually traveled route. Should a person travel by an indirect route for the traveler's own convenience, any extra costs shall be borne by the traveler and reimbursement for expenses shall be based only on such charges as would have been incurred by a usually traveled route. The Superintendent or designee shall designate the most economical method of travel for each trip, keeping in mind the following conditions:

1. The nature of the business.
2. The most efficient and economical means of travel (considering time of the traveler, cost of transportation, and per diem or subsistence required).
3. The number of persons making the trip and the amount of equipment or material to be transported.

Transportation by common carrier, when traveling on official business and paid for personally by the traveler, shall be substantiated by a receipt. All travelers are encouraged to make arrangements for transportation via common carrier through the travel agency through which a credit and billing procedure is already established with the School Board. In the event transportation, other than the most economical class as approved by the Superintendent or designee, is provided, the charges in excess of the most economical class shall be borne by the traveler.

The use of privately owned vehicles for official travel in lieu of public owned vehicles or common carrier may be authorized by the Superintendent, or designee, if a public owned vehicle is not available.

Whenever travel is by privately owned vehicle, the traveler shall be entitled to a mileage allowance at a fixed rate not to exceed the latest currently approved rate set forth in the Florida Statutes, or the common carrier fare for such travel to be determined by the Superintendent or designee. Reimbursement for expenditures related to the operation, maintenance, and ownership of a vehicle shall not be allowed when privately owned vehicles are used on public business and reimbursement is made pursuant to this paragraph, except as an incidental expense pursuant to incidental expenses. **continued..**

I. Procedure Name: Transportation

II. Basic Procedure: continued

All mileage shall be shown from point of origin to point of destination and, when possible, shall be computed on the basis of the current map of the State Department of Transportation. Vicinity mileage necessary for the conduct of official business is allowable, but must be shown as a separate item on the expense voucher.

Transportation by chartered vehicles, when traveling on official business, may be authorized by the Superintendent, or designee, when necessary or when it is to the advantage of the School Board, provided the cost of such transportation does not exceed the cost of transportation by privately owned vehicle.

The Superintendent may grant monthly allowances in fixed amounts to any School Board officer or employee for use of privately owned automobiles on official business for travel within Escambia County, Florida, in lieu of the latest currently approved mileage rate set forth in the Florida Statutes. Allowances granted shall be reasonable, taking into account the customary use of the automobile, the roads customarily traveled, and whether any of the expenses incident to the operation, maintenance, and ownership of the automobile are paid from funds of the School Board or public funds. Such allowances may be changed at any time and shall be made on the basis of a signed statement of the traveler, filed before the allowance is granted or changed, and at least annual thereafter. The statement shall show the places and distances for an average typical month's travel on official business and the amount that would be allowed under the approved rate per mile for the travel shown in the statement if payment had been made pursuant as previously outlined.

No traveler shall be allowed either mileage or transportation expense when he is gratuitously transported by another person or when he is transported by another traveler who is entitled to mileage or transportation expense. However, a traveler on a private aircraft shall be reimbursed the actual amount charged and paid for his fare for such transportation up to the cost of a commercial airline ticket for the same flight, even though the owner or pilot of such aircraft is also entitled to transportation expense for the same flight.

III. Contingencies/Variations:

None

I. Procedure Name: **Incidental Expenses**

II. Basic Procedure:

All authorized travelers may be reimbursed for the following incidental traveling expenses:

- A. Taxi fare, limousine, or rental car (a receipt is required for such expenses in excess of \$5 per occurrence).
- B. Ferry fares and bridge, road and tunnel tolls (a receipt is required for such expenses in excess of \$5 per occurrence).
- C. Storage or parking fees (a receipt is required for such expenses in excess of \$5 per occurrence).
- D. Business communication expense (an explanation is required).
- E. Convention or conference registration fee (receipt required). (A deduction shall be made for any meals included if stated on the receipt).

III. Contingencies/Variations:

None

I. Procedure Name: **Fraudulent Claims**

II. Basic Procedure:

Claims submitted pursuant to these travel policies shall not be required to be sworn to before a notary public or other officer authorized to administer oaths, but any claim authorized or required to be made under any provision of this rule shall contain a statement that the expenses were actually incurred by the traveler as necessary traveling expenses in the performance of his official duties and shall be verified by a written declaration that it is true and correct as to every material matter.

Pursuant to the provisions of Section 112.061(11), and Florida Statutes, any person who willfully makes and subscribes any such claim which he does not believe to be true and correct as to every material matter or who willfully aids or assists in, or procures, counsels, or advises the preparations or presentation under the provisions of this rule of a claim which is fraudulent or is false as to any material matter, whether or not such falsity or fraud is with the knowledge or consent of the person authorized or required to present such claim, shall be guilty of a misdemeanor of the second degree, punishable according to law. Additionally, whoever shall receive an allowance or reimbursement by means of a false claim shall be civilly liable in the amount of the overpayment for the reimbursement of the public fund from which the claim was paid.

III. Contingencies/Variations:

None

I. Procedure Name: Travel Reimbursement Vouchers

II. Basic Procedure:

The Assistant Superintendent for Finance and Business Affairs shall furnish a uniform travel voucher form which shall be used by all School Board officers, employees, and authorized persons when submitting traveling expense statements for approval and payment. No travel expense statement shall be approved for payment by the Superintendent or designee unless made on the form prescribed and furnished. (See Attachment #2)

The travel voucher form shall provide for, among other things, the purpose of the official travel and a certification or affirmation, to be signed by the traveler, indicating the truth and correctness of the claim in every material matter, that the travel expenses were actually incurred by the traveler as necessary in the performance of official duties. The routing for signatures of approval required on the travel voucher forms shall be the same as that required on the travel authorization forms. The original copy of the executed uniform travel authorization request form shall be attached to the uniform travel voucher on file. (See Attachment #1)

III. Contingencies/Variations:

None

Standard Operating Procedure: Travel

THE SCHOOL DISTRICT OF ESCAMBIA COUNTY TRAVEL VOUCHER REIMBURSEMENT CLAIM								Form T(3) YELLOW PAPER			
From: _____ (Employee Name)				Social Security #: _____							
_____ (Home Address)											
_____ (City/State/Zip)											
I hereby request per diem and/or reimbursement for travel expenses incurred by me in the discharge of official duties as shown in the itemized statement below.											
Schedule of Expenses and Itinerary of Traveler											
To (Destination): _____											
For (Purpose of Trip): _____											
Departure from Official Headquarters:		Date: _____		Time: _____ am / pm							
Return to Official Headquarters:		Date: _____		Time: _____ am / pm							
Itemized Expenditures				Amounts Claimed							
				Travel	Subsistence	Other					
TOTALS				\$ -	\$ -	\$ -					
				Total Amount Of This Claim \$ -							
				Less: Amounts Paid Direct By District							
				Less: Amounts Paid By Others							
				Less: Class C Meals							
				Amount Reimbursed To Internal Funds							
				Amount To Be Paid To Traveler \$ -							
Company		Account			Center						
Fund(4)	CIG(2)	Object(4)	Function(4)	TR(1)	Project(4)	YR(1)	CC (4)				
I hereby certify that this accounting and statement of travel is true and just in all respects and that payment has not been received. _____ (Signature) _____ (Title) _____ (Date Submitted)				Department Head Approval:				Superintendent's Approval:			
				Date: _____				Date: _____			
				Signature: _____				Signature: _____			
				Audited and Approved For: _____				Audited and Approved For: _____			
Audited By: _____				Reviewed & Approved By: _____							

Attachment #1
02-01-i8

- I. Procedure Name: **Employee Assistance Program**
II. Basic Procedure:



WHEN LIFE'S TRIALS SEEM TOUGHER THAN USUAL...CALL EAP

Your Employee Assistance Program is available for any employee with any type personal problem which might interfere with their work performance.

DETAILS ABOUT YOUR EAP

- The program provides evaluation, short term counseling, and referral for any employee or eligible family member.
- There is no fee for the use of your EAP service. The program is a benefit provided by your employer.
- You may refer yourself to the EAP by calling 474-9882 and scheduling an appointment with a counselor.
- No record of an employee's involvement with EAP will appear in your personnel record or have any effect on your job security.
- Professional counselors at Bingham-Turner and Associates - Cordova Counseling Center provide all services.
- Your supervisor can refer you to EAP when a problem interferes with your work performance. You decide whether or not to participate in the program.
- Appointments may be scheduled by calling between 8 and 5 weekdays. Our on-call counselor will assist you on weekends or evenings.

EMPLOYEE ASSISTANCE PROGRAM

Cordova Counseling Center
Bingham • Turner & Associates
4400 Bayou Boulevard • Suite 8-D • Cordova Square
Pensacola, Florida 32503
904-474-9882

I. Procedure Name: **Employee Assistance Program**

II. Basic Procedure: continued

III. Contingencies/Variations:

Drug Testing

If you have a problem with drugs or alcohol, or any other personal problem, you may want to call the School District of Escambia County's Employee Assistance Program (EAP). This is strictly confidential. You can get help BEFORE you may get hurt on the job.

If you are injured on the job and test positive for illegal drugs or alcohol, you may be denied your workers' compensation benefits. If you refuse or fail to take a drug or alcohol test, your workers' compensation benefits may be denied.

- I. Procedure Name: **Conduct and Disciplinary Action**
- II. Basic Procedure:

The following attachments are an effort to insure compliance with the letter and spirit of the Master Contracts of the School Board of Escambia County. Steps and procedures are outlined which are intended to clarify the requirements of the Master Contracts. This SOP includes forms, as attachments, which should be suitable for most disciplinary actions and procedures. These procedures can be modified for use with Administrative and Professional personnel. Mr. Joseph Hammons, attorney for the Superintendent, has worked with personnel from the School Board and the Bargaining Units in developing the following procedures.

Discipline of any type shall be administered only by the appropriate supervisor. All discipline shall be progressive, fair, and only for just cause. Discipline shall include, but not be limited to conference, verbal reprimand, written reprimand, suspension and dismissal. Prior to administering discipline the appropriate supervisor should follow the **N.E.A.T.** procedure (**N**-notice to employee for discussion, **E**-explanation of the problem, **A**-assistance to the employee, **T**-time to correct the problem).

PROCEDURES FOR DISCIPLINE

1. When an employee is having difficulty doing his or her job and prior to consideration of discipline, the employee should receive counseling directed to help the employee overcome his or her difficulty. A copy of any record of this counseling session must be retained by the supervisor and a copy given to the employee (see Attachments A & B).
2. Prior to any additional disciplinary action of an employee the supervisor shall provide written notice to the employee of the "nature of the complaint" and allow the employee time to secure appropriate representation. A conference shall be scheduled to discuss the disciplinary action being considered. If the employee is a member of the Bargaining Unit, the employee shall have the right to have an Association witness attend the conference (see Attachment C).
3. When the decision for discipline is to be a written reprimand, please refer to Attachment D. If, however, the discipline is to be more severe (i.e., suspension or dismissal) then the supervisor should refer to paragraph 4 of this document.

Continued....

II. Basic Procedure: continued

4. After the conference identified in **paragraph 2** above is concluded, if more serious disciplinary action is to be taken, the supervisor should contact the Assistant Superintendent – Operations for assistance in coordinating notice to appropriate officials. Thereafter, the supervisor shall provide written notice to the Assistant Superintendent – Operations giving an accurate account of the offense including date, time, details of the offense including the names of witnesses who may provide evidence.
5. The employee must be notified in writing of the date and time to meet with the Director or designee for the purpose of presenting the notice of disciplinary action to be implemented. Prior to such meeting the employee shall have been provided a copy of the written notice containing information and an accurate accounting of the offense as created pursuant to paragraph 3 above. If the employee is a member of the Bargaining Unit the employee shall have the right to have an Association representative present during the meeting to serve the notice of disciplinary action to be implemented (**see Attachment E**).
6. If the employee fails to attend the meeting scheduled pursuant to paragraph 4 above, the notice of disciplinary action may be provided the employee by delivery in person or by certified mail, return receipt requested.

NOTE: The attachments may be reproduced as needed.

DUE PROCESS:

“Due Process” is the implementation of a PROCEDURE, which when adhered to guarantees the PROTECTION OF INDIVIDUAL RIGHTS. When applied to the Corrective Discipline process, this means there can be no surprises. The individual staff member must be made aware of what is expected regarding conduct, performance and behavior. Furthermore, the staff member must be guaranteed “fair” treatment when a violation occurs. The individual must be kept informed, and the administrator must be able to prove this fact through appropriate documentation.

1. Was the rule, conduct, procedure or order KNOWN to the staff member and was it one that would be considered reasonable and related to the efficient, orderly operation of the school?

Continued....

II. Basic Procedure: continued

2. Was the staff member notified relative to expected behavior in this regard and was there prior knowledge and indication of PROBABLE DISCIPLINARY CONSEQUENCES for failure to comply on the part of the staff member?
3. Was there a fair and objective INVESTIGATION of the circumstances and the fact PRIOR TO the disciplinary action; and, in fact was there a clear violation or disobedient action?
4. Are there specific data, DOCUMENTATION, and other information that exists to substantiate and verify the situation?
5. Does the disciplinary action taken reflect a degree that is consistent with the seriousness and nature of the offense? Is it REASONABLE?
6. Has the staff member's previous record been considered and has the person received treatment that is CONSISTENT with the treatment of others who have been disciplined for similar circumstances?

*Due process guarantees have been provided if the administrator can answer "yes" to all six of the previous questions.

PROGRESSIVE DISCIPLINE

- I. Conference (informal) – NEAT; (N-notice to employee for a discussion, E-explanation of the problem, A-assistance to the employee, T-time to correct the problem).
- II. Counseling Session
 1. Notice employee in writing date, time and place of meeting if eligible. May have union representative present.
 2. Prepare a written agenda of your concerns.
 3. Hear their side of the issue.
 4. Leave employee understanding consequences if no improvement.

If the employee improves behavior or performance, the next step is not necessary. If not, ...

Continued.....

II. Basic Procedure: continued

III. Consideration of Disciplinary Action

1. Notice employee in writing of date, time and place of meeting if eligible. May have union representation present.
2. Review concerns of performance.
3. Hear their side.

IV. Discipline Meeting

1. Notice employee in writing of date, time and place of meeting if eligible. May have union representative present.
2. Present letter or Form of Discipline to employee.
3. No discussion is necessary.
4. If discipline goes beyond reprimand, contact Assistant Superintendent – Operations for drafting formal charges for suspension or dismissal.

If employee challenges your action – grievance procedures begin.

III. Contingencies/Variations:

None

ATTACHMENT "A"

DATE: _____

I, the undersigned supervisor, do request that a counseling session be held with the undersigned employee on (date, time, place).

Subject: 1. _____
2. _____
3. _____
4. _____

The employee has a right to Union representation at this meeting.

Supervisor's Signature

Employee's Signature

Attachment A
02-01-j2

Attachment "B"

DATE: _____

I, the undersigned, supervisor and employee, do certify that a Counseling Session was held, and employee was advised he/she had the right to Union representation.

Summary: _____

Supervisor's Signature

Employee's Signature

Attachment B
02-01-j2

ATTACHMENT "C"

MEMORANDUM

TO:

FROM:

DATE:

RE: Disciplinary Action Consideration

This letter is to notify you of disciplinary action that is being considered and to inform you that you have the right to Union representation.

Nature of Complaint: _____

You are to appear in the office of _____

(DATE)

(TIME)

Any questions you may have, please feel free to call upon me.

HAND DELIVERED BY: _____

SIGNATURE OF EMPLOYEE. YOUR SIGNATURE ACKNOWLEDGES RECEIPT OF THIS MEMORANDUM AND DOES NOT MEAN YOU AGREE WITH THE CHARGES.

TIME AND DATE

**Attachment C
02-01-j2**

ATTACHMENT “D”

THE REQUIREMENTS OF AN OFFICIAL WRITTEN REPRIMAND

1. The reprimand must be individually written stating specific material facts, such as DATE, TIME, PLACE, WITNESSES to, and ACTIONS of the individual(s) involved.
2. The reprimand must include a quotation of the REGULATION, RULE, CONDUCT, PROCEDURE or ORDER violated or breached.
3. The reprimand should outline all previous ORAL or WRITTEN REPRIMANDS or warnings, if any.
4. It must be explicit and to the point – prove the misconduct or offense charged by using sensory facts. Avoid making ASSUMPTIONS or using HEARSAY evidence. Tell what was SEEN, HEARD, TOUCHED, TASTED, or SMELLED. Let the concrete sensory facts tell the story to prove the case. Any case is weakened in the beginning when disciplinary action is based on more than sensory facts.
5. It must be stated that this letter constitutes a WRITTEN REPRIMAND.
6. It should state that the staff member is being given another opportunity to IMPROVE in performance, and express the hope that the staff member does so.
7. It should state that if there is no improvement, the staff member will be subject to FURTHER DISCIPLINARY ACTION. This is a critical point. The administrator must remain flexible, not stating what the further action will be.
8. The staff member must be given a copy of the letter.
9. Forward a copy of the letter to Human Resources Management Office to be included in the staff member’s OFFICIAL PERSONNEL FILE.

**Attachment D
02-01-j2**

(USE SCHOOL OR DEPARTMENT LETTERHEAD)

ATTACHMENT "E"

(Date)

(Employee's Name & Address)

RE: Notice of Proposed Disciplinary Action

Dear (Employee's Name):

You were previously advised that disciplinary action was being considered because of (nature of complaint).

Enclosed please find a copy of a report identifying specifically the offense or misconduct involved as well as an accounting of the offense including times, dates, witnesses, and such other information as is presently available. This report is provided pursuant to provisions of the Master Contracts. Pursuant to the provisions of the Master Contracts a meeting has been scheduled for the purpose of presenting notice of disciplinary action to you.

You are to appear in the office of _____
on _____ (date) at _____ (time). You have the right to
have an Association representative present at this meeting. Please govern yourself
accordingly.

Sincerely,

(EMPLOYER'S NAME & TITLE)

Enclosures

Attachment E
02-01-j2

I. Procedure Name: Position Vacancy Interview

II. Basic Procedure:

1. This interview process shall be used for permanent and temporary vacancies. The steps and procedures outlined here are intended to ensure compliance with the requirements and spirit of the Master Contract. All necessary forms are included (see Attachments #'s 1-8). These procedures are also consistent with the Educational Support Personnel Checklist (Attachments #5 and #6) that must be completed and returned to the Educational Support Personnel Department upon completion.
2. Applicants for vacancies are contacted by the Department to schedule an interview appointment for the date and times determined by the Department Head. It is a good practice to inform applicants of any unique requirements of the job and offer an orientation to the job and department if appropriate. If you wish to reduce the number of applicants to be interviewed, it must be done in seniority order. If, for example, you interview the ten (10) most senior employees and none are qualified. You must schedule additional interviews with the next group, based on seniority.
3. The Union office is contacted to appoint union representation for the interview committee at least two (2) days prior to the interview date.
4. An interview committee of five (5) members, including a minimum of one (1) Union representative and the remainder representing the district, is assembled. Administrative Position Interview Committee make-up is further prescribed.
5. Written and/or skills tests may be given in conjunction with the oral interview. Test questions and skills test are submitted by the appropriate Supervisor to be reviewed by the Department Head as well as evaluated by independent experts to insure that the tests measure only skills identified in the job description. A minimum score of 70% must be achieved on all written and skills tests.
6. Committee members are provided an interview packet with all of the necessary documents and scoring sheets. Documents provided in the packet are listed on the Interview Checklist (Attachment #1).

Continued.....

I. Procedure Name: Position Vacancy Interview

II. Basic Procedure: continued

7. The committee chairman is provided a separate master interview packet with all of the necessary documents and scoring sheets. Documents provided in the packet are listed on the Interview Checklist (Attachment #1).
8. The committee chairman gives verbal instructions and the Interview Checklist is completed. At this time, instructions regarding scoring and ranking are provided and weighting of written/skills test versus oral interview is determined. The committee chairman ensures consensus among the committee members of the procedures to be used during the interviews.
9. Each applicant is interviewed and receives a score by each committee member on individual score sheets (Attachment #2). Written tests and skills tests are scored following completion of the interview. *
10. Each committee member's score for each candidate is converted to a numerical ranking on the Interview Score Sheet with a ranking of #1 being the highest (best) rank. All parts of the interview are weighted according to the pre-determined formula and added together to produce the final score for each applicant. The skills test and/or written test rankings are determined by the committee. Each committee member will use the same skills/written test ranking for each applicant.
11. Each committee member's final scores are compiled by the committee chairman on the Applicant Tally Sheet (Attachment #3) and added to produce the final tally and indicating the top ranked candidate (lowest final tally).
12. Once the final ranking is produced the committee determines if an "essentially equal" situation exists between the top-ranked applicants.
13. The chairman of the committee will contact the references of the applicant. If the applicant receives positive recommendations, the committee recommendation is forwarded to the Director. If the references are not positive, the committee will be reassembled and will review the references.

Continued.....

I. Procedure Name: Position Vacancy Interview

II. Basic Procedure: continued

14. The top ranked candidate is notified and offered the position and the unsuccessful candidates are notified in writing within ten (10) days (Attachment #7).

*In accordance with Article VI.2D of the Master Contract (Attachment #4), factors such as performance ratings, attendance and disciplinary records for the past two (2) years shall be a consideration.

III. Contingencies/Variations:

1. Resumes are not required for ESP positions but can be required for professional classification positions.
2. Professional classification committee rankings (all applicants) will be listed in preferred order (point total or number not to be listed) and forwarded to the Assistant Superintendent – Operations to be forwarded to the Superintendent.
3. For bargaining unit positions, district seniority will prevail if candidates are determined to be essentially equal in accordance with Master Contract Article VI.2D
4. For professional classification positions, if candidates are deemed “essentially equal” the following options should be considered:
 - a. Raw score comparative;
 - b. Additional round of head to head interview;
 - c. Committee rankings of the “essentially equal” candidates only.

INTERVIEW CHECKLIST

POSITION: _____ **DATE:** _____

The Committee has been provided with a copy of the following:

- ◆ Oral Interview Questions
- ◆ Committee Interview Score Sheets
- ◆ Interviewer Individual Tally Sheet
- ◆ Job Posting
- ◆ Job Description
- ◆ Contract Language on Promotions
- ◆ Applicants' Resume

The Committee Chairman has been provided with a copy of the following:

- ◆ Interview Checklist
- ◆ Oral Interview Questions
- ◆ Written Test, Skills Test/Answer Keys
- ◆ Committee Interview Score Sheets
- ◆ Interviewer Individual Tally Sheet
- ◆ Applicant Tally Sheet
- ◆ Job Posting
- ◆ Job Description
- ◆ Contract Language on Promotions
- ◆ Performance ratings, attendance and disciplinary records for past two (2) years.
- ◆ Seniority List

The Committee has reviewed and discussed the following:

- ◆ Relationship between Committee Members and Applicants;
- ◆ Each Committee Member has stated that they will be fair and impartial.
- ◆ Interview Questions;
- ◆ Interview questions to be read by _____;
- ◆ Skills Test/Written Test Questions and Correct Answers;
- ◆ Weight of Interview Questions versus Written/Skills Test – Weight is _____;
- ◆ Percentage of score on the Written/Skills Tests that will measure an acceptable level of technical qualifications, including technical ability, related experience, education and job related training; _____%
- ◆ Method of scoring and ranking applicants;
- ◆ Job posting and description;
- ◆ Contract language on promotions;
- ◆ District Seniority Lists;
- ◆ Factors such as performance ratings, attendance and disciplinary records for the past two (2) years shall be a consideration; and
- ◆ Be sure all cell phones, radios and beepers have been turned off.

Committee Members

Typed Name
Typed Name
Typed Name
Typed Name
Typed Name

Signatures of Committee Members

**Attachment #1
02-01-j3**

INTERVIEW SCORE SHEET

This is a worksheet for you to use to score each applicant.
Your final score will be recorded on the Chairman's Applicant Tally Sheet and you will be asked to sign off on said copy.

DATE: _____

NAME OF APPLICANT: _____

INTERVIEW COMMITTEE MEMBER: _____

	Excellent (8)	Above Avg. (6)	Average (4)	Below Avg. (2)	Not Acceptable (0)
Yourself					
Question #2					
Question #3					
Question #4					
Etc...					
Best/Most Qualified					
Anything Else					
Subtotal					

NOTES: _____

Oral Score _____

Oral Ranking _____

Applicant Tally Sheet
 (Type position to be interviewed)
 Interview Date:

PLEASE WRITE ALL SCORES IN INK!

Interview Committee Member:	#1	#2	#3	#4	#5	#6	Total
Candidates:							
1 Type name - time							
2 Type name - time							
3 Type name - time							
4 Type name - time							
5 Type name - time							
6 Type name - time							
7 Type name - time							
8 Type name - time							
9 Type name - time							

The committee has reviewed the seniority of all applicants and has determined that the applicants are not essentially equal.

Applicant Ranking and Scoring Instructions

In the course of conducting interviews we have discovered a problem with totaling the score sheets of individual committee members. Therefore, we have adopted a system where each committee member ranks the applicant in relation to the other applicants. For example, if there are ten applicants, each committee member would assign a score based on the comparison between the applicants so that the top applicant would receive one point, the second applicant would receive two points, the third applicant would receive three points, etc., with the last placed applicant receiving ten points. The committee members' ranking would be totaled and the applicant with the lowest score would be the committee's highest rated applicant.

Committee Members Signatures:

**SKILLS TEST / WRITTEN TEST / INTERVIEW
INTERVIEWER INDIVIDUAL TALLY SHEET
SCORE SHEET**

Candidates	Skills Test Score	*Skills Test Ranking	Written Test Score	*Written Test Ranking	Interview Raw Score	*Interview Ranking	Sum of Ranks (*)

Interview Committee Member: _____

**ARTICLE VII
POSTINGS, PROMOTIONS, TRANSFERS, REDUCTIONS AND RECALL**

VII.1 POSTINGS AND INTERVIEW SELECTION COMMITTEE

- A. All vacancies shall be posted on-line and in all work sites for ten (10) working days on appropriate bulletin boards, except those vacancies the District will use to comply with the provisions of Section VII.8 Workers' Compensation Retraining and Job Placement Guidelines. With mutual written agreement of the parties, the posting period for vacancies that occur during the student attendance calendar year may be limited to less than ten (10) but no less than five (5) working days. Postings shall include, but may not be limited to: hours, responsibility(ies), work location, pay grade and other pertinent details. (Bus Operator and Bus Assistant postings will indicate total route.) Employees wishing to fill the vacancy shall apply in writing to the Human Resources Department on the form attached as Appendix C.
- B. Employees shall be allowed to apply for any available vacancy or position for which they meet the qualifications.
- C. The District shall notify all 10 and 11 month employees of all vacancies which are posted during the time when they are not working.
- D. Employees who interview for District vacancies shall suffer no loss in compensation and shall not be required to use leave to participate in interviews conducted during their normal work hours.
- E. Temporary vacancies are defined as positions which are not authorized to be filled on a permanent basis; are vacant pending a bid procedure; or, are vacant because of an approved leave of absence but which will be filled on a temporary basis. Procedures for filling temporary vacancies may be restricted to the work site or department with the temporary vacancy. Procedures for filling temporary vacancies in Bus Operation positions shall be those specified in Article XII.7, Hours and Working Conditions, Bus Operators, and/or those agreed upon by the Bus Employee Committee.
- F. Temporary vacancies which become permanent shall be posted and filled in accordance with Article VII.1 A. Qualified applicants with permanent status employed by the Board shall be given priority over temporary or substitute employees in filling the position.
- G. Temporary positions which become permanent shall be filled by qualified applicants with permanent status employed by the Board prior to any temporary or substitute being promoted to permanent status. If no qualified permanent employee applies, or if the time cannot be distributed to permanent employees who want the extra hours, the vacancy may then be open for application by qualified temporary employees. EXCEPTION: entry level Food Service positions.
- H. When requested by the District, the Escambia ESP President may appoint one (1) Escambia ESP member to serve on the interview committee for each vacancy to be filled in this bargaining unit and for positions in any bargaining unit which supervise members of this bargaining unit, or administrative positions within departments which direct the duties of members of Escambia ESP. In cases where Escambia ESP makes an appointment to an interview committee, they shall appoint those persons based on their in-field experience, or other experience related to the position being filled. Escambia ESP members serving on the interview committee shall not receive compensation or travel pay beyond their normal work day and must have prior approval of their supervisor.
- I. All applicants for any vacancy will be provided with the same form(s) or interview formats appropriate to that position. When written questions, forms or tests are used in the interview process, all those

interviewed will be given the same questions, forms or tests. The District will develop the written questionnaire and/or interview questions to be used in filling the vacancy. The written questionnaire and/or interview questions will be reviewed with the Escambia ESP representative for input prior to the conducting of the interview and selection process.

VII.2 PROMOTIONS

- A. Promotion shall be defined as advancing from one classification to another classification with increased duties and responsibilities and a higher rate of pay.
- B. In cases where the qualifications, (such as, but not limited to, technical ability and training), of all applicants are essentially equal, current District employees shall receive preference in appointments.
- C. Unsuccessful promotion candidates will be notified in writing by the appropriate supervisor, within ten (10) days that someone else has been given the job.
- D. Reasons for not being promoted will be given in writing to any eligible employee upon request.
- E. If a promotional position is either permanently or temporarily vacant, and the District determines to award a temporary promotion for that position (as defined in Article XII.3 Assignments), all permanent employees at the school site or in the administrative cost center where the temporary promotion exists shall be notified of its availability and given the opportunity to request the temporary promotion. Notice of the temporary promotion shall include the job expectations and requirements. The most qualified employee requesting the temporary promotion shall be assigned. In cases where more than one employee requests the position and qualifications are essentially equal, the employee with the most District seniority shall receive the temporary promotion. A substitute or temporary employee shall fill the promoted employee's position. No other position shall be affected. If no qualified employee at the school site or in the cost center is interested in the temporary promotion, the District may fill the temporary promotion with a qualified, current employee.

VII.3 VOLUNTARY TRANSFERS

- A. Voluntary Transfer shall be defined as a relocation from a position in one work site or department to a position in another work site or department with the same pay grade which is initiated by the employee.
- B. The Human Resources Department shall maintain an up-to-date list of vacancies and provide said list to the Union Office on at least a bi-weekly basis.
- C. Transfer requests by current employees will be considered prior to hiring anyone from outside the School District. Employees who apply for a transfer and are interviewed shall be notified in writing by the appropriate administrator of the outcome of their application.
- D. The District will encourage immediate supervisors to honor transfer requests based on an employee's desire to work in a work site which is closer to the employee's residence than the current assignment.

VII.4 INVOLUNTARY TRANSFER

- A. An Involuntary Transfer shall be defined as a change in work location which is initiated by the District.
- B. If an Involuntary Transfer becomes necessary, the employee(s) in the school or department and the Union shall be notified. Involuntary Transfers shall not be for arbitrary reasons.

- C. Each employee in the affected work site shall be provided with an up-to-date list of vacancies and will be given an opportunity to accept one of the vacant positions. If no employee in that work site voluntarily transfers, the employee will be transferred based on district-wide seniority among the employees in the affected classification, with the employees having the least amount of district-wide seniority being transferred first.
- D. Employees who are not satisfied with their placement as a result of the Involuntary Transfer because it increased their travel distance from home or reduced their salary, shall be given consideration to achieve a Voluntary Transfer to a vacant position as soon as possible after such suitable vacancy exists.
- E. If an employee who is placed as a result of an involuntary transfer is not satisfied with their placement within 6 months of the placement, they shall have up to two opportunities to be placed in other vacant positions.

VII.5 REDUCTION IN PERSONNEL AND RECALL

- A. In the event that the Board or the Superintendent determines that a reduction in personnel is necessary, written notice will be provided to the Union which outlines the proposed number of employees affected, the locations and the reason for such reduction.
- B. In the event of a reduction of the number of employees in any classification in any work site or department, the Board shall lay off employees district-wide within that classification in reverse order of the employees' seniority. Affected permanent employees may bump employees in lower classifications for which they are qualified to perform the duties. The least senior employee in the lower classification will be the first bumped, and only employees with less seniority than those being laid off will be bumped.
- C. Employees who were demoted through use of the bumping system because of layoffs shall be returned to their original classification in order of seniority as openings in those classifications occur.
- D. Employees shall be called back to service within affected classifications according to their seniority. The Board shall recall each employee by telephone or in person and confirm the recall by certified United States mail or hand delivery to the last known address.
- E. Each employee who wishes to be recalled shall notify the Board of their current address. An employee who receives notice of recall will inform the Board of his/her intent to accept or reject the recall order within seventy-two (72) work hours after receipt of the notice. Except in case of emergency, an employee's failure to do so will forfeit all rights to recall.
- F. Except in case of extenuating circumstances, an employee who has notified the Board of acceptance of the recall and who, thereafter, fails to report at the agreed upon time, shall forfeit all rights.
- G. No new employees shall be hired in affected classifications until all laid-off employees have been rehired.
- H. Employees who have been laid off shall be placed on a priority substitute list for their classification and shall be offered substitute work before any temporary or substitute is called.

Standard Operating Procedure: Human Resources

EDUCATIONAL SUPPORT PERSONNEL INTERVIEW CHECK LIST (Internal Job Postings/Permanent Employees Only)

School/Department:

The advertisement period for _____ expired as of _____. Enclosed are applications from permanent district employees. All applicants must be contacted. It is recommended that interviews be conducted within 10 working days.

Sequential Interview Check List (Check each section upon completion)

_____ **Contact Escambia NEA (476-2906) to request an association representative** (at least 2 days prior to the scheduled interview date) **Was a representative assigned?** _____
Name of Association Rep: _____

_____ **Select and list other committee members:** _____

_____ **Review job description/develop questions.** (Interview question should be relevant to job requirements)

_____ **Contact all applicants and schedule interviews.** (Document response/date of contact)

_____ **Review interview questions and scoring process with committee members.**

_____ **Conduct interviews, review scores, administer skills test (if applicable)**
(Factors to consider include evaluations, attendance, disciplinary records for the last two years, training and experience, technical ability, interview scores, skills test and seniority (Note: Seniority shall prevail if applicants are determined by the committee as essentially equal))

_____ **Interview Date:** _____ **Was a skills test given?** Yes _____ No _____

_____ **Committee Recommendation:** _____
(Name of Successful Candidate)

_____ **Notify successful applicant and advise when to report to work** (Note: Previous supervisor or employer may require up to two weeks notice.)

_____ **Complete and submit Educational Support Personnel Appointment Form with this form (Interview Check List)**

_____ **Notify unsuccessful district applicants in writing within 10 days** (Master Contract)

_____ **No Selection made from this group of applicants – Check one and return this form to the Educational Support Department**

_____ Re-advertise for additional in house applicants (position will be re-advertised on next posting)

_____ Advertise through ESCAROSA and/or on the Ed Support Job Line

_____ Consider current temporary/sub employee (Required Application and interview check list will be forwarded from the Educational Support Department upon receipt of this form. **Do not conduct Interview(s)** until receipt of these documents)

_____ **Return this form to the Educational Support Department upon completion.**

Principal/Department Head: _____ Date: _____

Attachment #5
02-01-j3

Standard Operating Procedure: **Human Resources**

**EDUCATIONAL SUPPORT PERSONNEL
INTERVIEW CHECK LIST**
(For applicants which are not current permanent employees)

School/Department: _____ **Job Title:** _____

Job Line Advertisement Date: _____ **Deadline Date:** _____

Sequential Interview Check List (Check each section upon completion)

_____ **Select the interview committee** (If permanent district applicants were considered but not selected for this vacancy, it is recommended that you use the same committee members for this interview process.)

_____ **Contact Escambia NEA (476-2906) to request a union representative if no prior interview committee was formed.** (The association must be contacted even though you are not considering permanent district employees.)

_____ **Was an association representative appointed to this committee?**
(Yes or No)

If yes, name of association representative: _____

List other committee members:

_____ **Contact applicants/schedule interviews** **Interview Date:** _____
List applicants considered for this position:

_____ **Review interview questions and scoring process with the interview committee**

_____ **Was a skills test given for this position?** Yes _____

_____ **Committee recommendation:** _____

_____ **Notify successful applicant** _____ **Notify unsuccessful applicants in writing**

_____ **Complete an Educational Support appointment form** (give to new employee and direct to the Educational Support Department to complete pre-employment paperwork prior to reporting to work)

_____ **Return this form to the Educational Support Department - Attach a copy of the successful applicant's application.**

Principal/Department Head: _____ Date: _____

**Attachment #6
02-01-j3**

Date

Ms. XXXXX

Dear Ms. XXXX:

Thank you for your interest in applying for the Department Name position title position. We appreciate you taking the time to interview with our selection committee.

At this time we have elected to offer the position to another candidate. If another position in Department Name for which you are qualified becomes vacant, we hope you will consider applying.

I would like to take this opportunity to wish you the best of luck in your future endeavors.

Sincerely yours,

Department Head Signature

c: Felita Averhart

Attachment #7
02-01-j3

I. Procedure Name: **Discipline Log**

II. Basic Procedure:

While we strive at all times to assist employees in successfully fulfilling their duties, unfortunately it may occasionally be necessary to correct an employee's behavior in a manner consistent with the appropriate master contracts, state and Board policies. The following procedure is in effect when it becomes necessary to institute a formal discipline meeting.

1. When it becomes necessary to conduct a formal discipline meeting, letter of reprimand, suspension or termination, an entry should be made in the discipline log (see Attachment #1).
2. The entry should include employee name, date, a brief description of the misconduct and discipline action taken.
3. This entry should be made when the discipline action is taken. This log should be maintained by the Department Head.

III. Contingencies/Variations:

None



Escambia County
School District
Escambia County Florida



Maintenance Services Department
Policies and Procedures Manual

Section 2
Maintenance
Operations



MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL

TABLE OF CONTENTS

SECTION 2: Maintenance Operations

Introduction

- Department Aim
- Department Overview
- Organizational Structure

a. Requests for Maintenance Services

1. General

2. Request Submission

Attachment #1 – Request Submission Flowchart

Attachment #2 – Emergency Request Mini-Slip

3. Canceling Requests

4. Online Requests

5. Completed Requests

Attachment #1 – Sample of Completed Work Request

Attachment #2 – Completed Work Request Flowchart

6. Safety Inspection Request Submission

Attachment #1 – Safety Request Submission Flowchart

7. After Hours Emergency Response

8. Request Data Entry (OASIS)(OFFICE COPY ONLY)

b. Working Hours

1. Normal Workday

2. Breaks

3. Tardiness

4. Shop Time

c. Systems Operation

1. Fire Alarm Systems – Alarm and Trouble Conditions



MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL

SECTION 2
TABLE OF CONTENTS – continued

- d. Surplus Operations
 - 1. Surplus Procedures
 - Attachment #1 – Sample Transfer/Disposal Form*
 - Attachment #2 – Sample Scrap List*
 - Attachment #3 – Sample Auction List*
 - 2. Customer Surplus Guidelines
 - 3. Auction Responsibilities
 - 4. Surplus Technology Disposal
 - 5. Moving Services and Options



Escambia County
School District
Escambia County Florida



Maintenance Services Department
Policies and Procedures Manual

Introduction

MAINTENANCE SERVICES DEPARTMENT

MISSION STATEMENT

The mission of the Maintenance Services Department is to provide a clean, safe and comfortable environment to support the District's Mission, Vision and Aims.

VISION STATEMENT

The Maintenance Services Department will strive to be a leader amongst our peers in providing the best maintenance and custodial services attainable in the areas of communications, technology and preventive maintenance while continuing to improve accountability and efficiency in providing these services.

AIM

Continual improvement of maintenance services to exceed our Customers' need.

Maintenance Department Overview

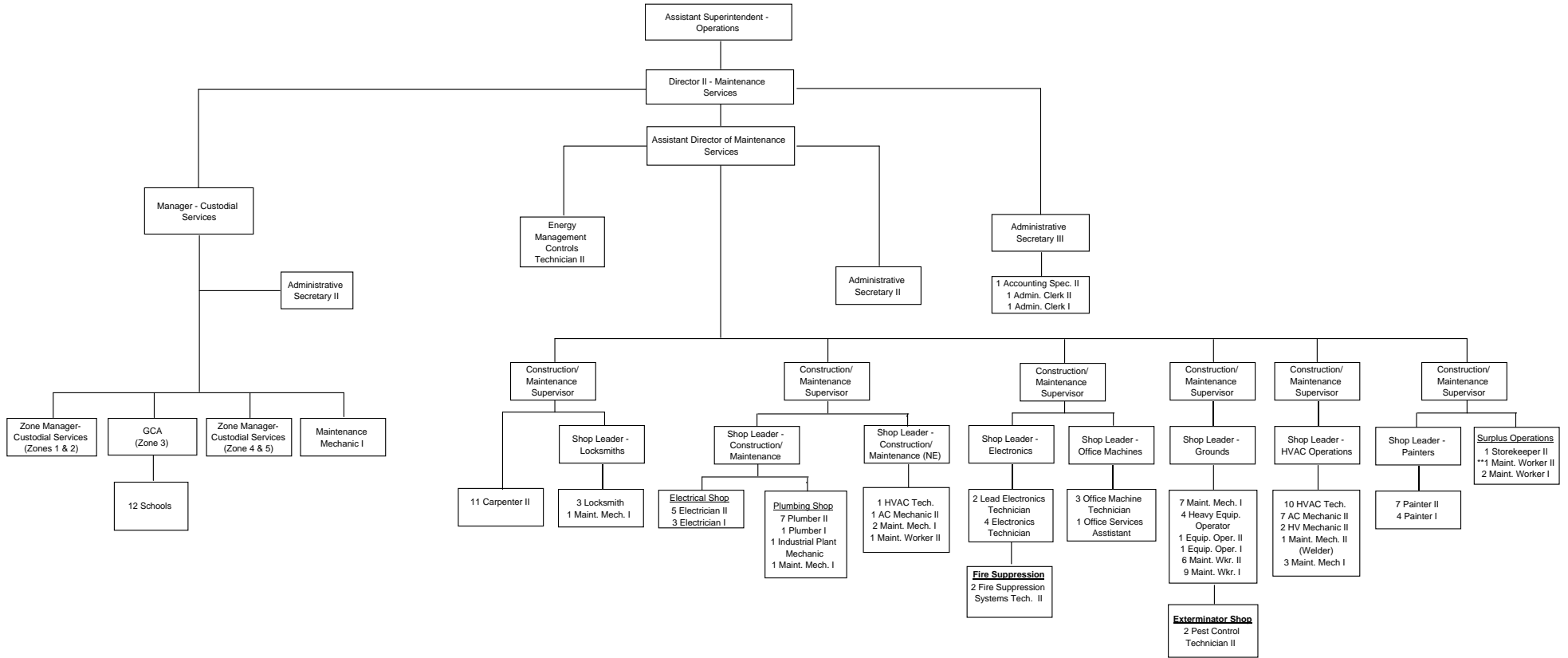
The Maintenance Department for the School District of Escambia County is located at 30 East Texar Drive, Pensacola, Florida, and a small North County shop is located in Century, Florida. There are approximately 143 employees of the Maintenance Department consisting of an office staff and 13 divisions. These divisions are:

Carpentry
Electrical
Electronics
Exterminating
Fire Suppression Systems
Grounds
Heating & Air
Locksmith
North County Maintenance Office
Office Machine Repair
Painting
Plumbing
Surplus Operations

The Director of Maintenance Services works under the direction of the Assistant Superintendent – Operations.

The office is open at 6:30 AM every workday and is closed at 3:30 PM. Emergency service can be obtained after hours by calling the Maintenance Department answering service at 850-438-0701.

Maintenance & Custodial Departments Organizational Chart



**Surplus Ops - Michael Hall is a Maintenance Worker II from Grounds on permanent light duty

Standard Operating Procedure: **Requests for Maintenance Services**

Author: MRP

Department: **Maintenance Services**

Issue Date: 12/11/02

SOP #: **02-02-a1**

Rev. Date: 06/9/15

- I. Procedure Name: **General**
- II. Basic Procedure:

The Escambia County School District Maintenance Department consists of 13 shops and completes and processes approximately 25,000 Requests for Maintenance Services each year.

Carpentry (CP)
Electrical (EL)
Electronics (ET)
Exterminator (EX)
Fire Suppression Systems (FS)
Grounds Crew (GC)
Heating & Air (HA)
Locksmith (LS)
North End (NE)
Office Machine Repair (OMR)
Paint (PA)
Plumbing (PL)
Surplus Operations (SO)

A Request for Maintenance Services is a request for repairs/preventive maintenance, etc., that is either telephoned to the Maintenance Department by the school/department or electronically submitted via the online work request system (TeamWorks). Work requests telephoned in by the school/department should be limited to extreme emergency calls only, i.e., life safety or property damage. Any work requests resulting from vandalism should be indicated so that Risk Management may be properly notified.

All work performed by the Maintenance Services Department requires a Request for Maintenance Services form.

Work request numbers are issued to all valid requests received.

Standard Operating Procedure: **Requests for Maintenance Services**

Author: MRP

Department: **Maintenance Services**

Issue Date: 12/11/02

SOP #: **02-02-a2**

Rev. Date: 04/10/15

I. Procedure Name: Request Submission

II. Basic Procedure:

1. Work requests are received electronically via the online Request for Maintenance Services system (TeamWorks) from a school or department and are noted by type of problem such as emergency, routine maintenance, vandalism, etc. At that time a computer-generated number is assigned. The Dispatcher reviews the work request to determine if it is a maintenance function. If it is a maintenance function, the Dispatcher opens the work request, assigns a shop, and prints the form. The request is placed in the shop mailbox to be picked up and scheduled by the Supervisor.
2. If a request is of an urgent nature or is a high priority, the work is dispatched to the Supervisor for appropriate action.
3. If dispatched, the Supervisor assigned and the time of dispatch are noted on the work request and placed in the appropriate shop mailbox. (Attachment #1)

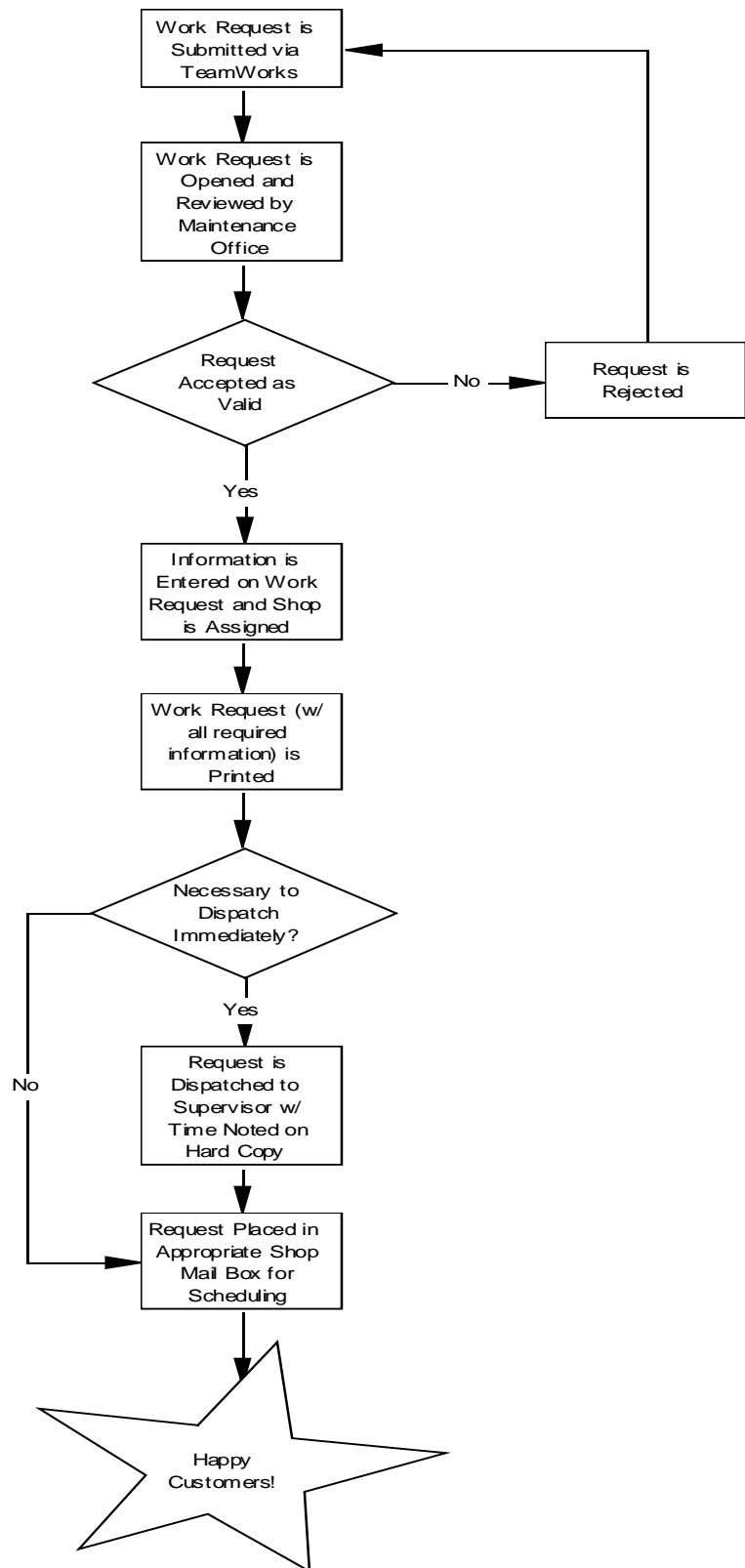
III. Contingencies/Variations

Extreme emergencies that jeopardize safety or facility assets are submitted by telephone at 469-5586.

1. When telephone calls are received for emergency repairs, the person receiving the call obtains as much information as possible, including the nature of the problem, its location (building and/or room numbers) and type of equipment. Find out if the problem was created by vandalism. If so, note accordingly. Have the person calling be sure to put this request into the online system so that a work request will be created and a number issued for the call.
2. The Dispatcher will dispatch telephoned emergencies immediately to the appropriate shop Supervisor and place the hard copy of the work order in the shop mailbox.

Request Submission

**Requests for Maintenance Services
Procedure Flow Chart**



Standard Operating Procedure: **Requests for Maintenance Services**

Author: MRP

Department: **Maintenance Services**

Issue Date: 12/11/02

SOP #: **02-02-a3**

Rev. Date:

I. Procedure Name: **Canceling Requests**

II. Basic Procedure:

1. If it becomes necessary to cancel a Request for Maintenance Services, the appropriate Supervisor will forward the request with rationale to the Director or Assistant Director.
2. The Director or Assistant Director will verify that the request should be cancelled and initial the request.
3. The request will be forwarded to the office staff (Data Entry Clerk) to be purged from the system.

III. Contingencies/Variations:

None

I. Procedure Name: **Online Requests**

II. Basic Procedure:

Authorized users can use the following to assist in entering an online request:

1. Enter the TeamWorks Maintenance Work Order system.
2. Log in using your District Novell log in user ID and password.
3. If the web page does not automatically show the Remote Request User Dashboard, click My Dashboard from the selections provided on the left of the page.
4. At the top of the page select "Set this dashboard as your homepage".
5. To add a new work order click the "Add New Work Order" button at the top of your dashboard.
6. Select the location from the drop down list provided (required field)
7. Enter the room number (required field).
8. Enter the contact information (name and telephone number [required field]).
9. Enter the contact email address (required field).
10. Type a detailed description of the work being requested (required field).
11. Click the Submit button.

At this time you can view the work request for accuracy, revise it, print it for your records, submit additional requests, or log out of the system.

ALL REQUIRED FIELDS MUST BE FILLED FOR WORK REQUEST SUBMITTAL.

REMINDER: Different types of work (i.e., AC, Carpentry, Locksmith, etc.) still have to be placed on separate work requests.

III. Contingencies/Variations:

None

Standard Operating Procedure: **Requests for Maintenance Services**

Author: MRP

Department: **Maintenance Services**

Issue Date: 12/11/02

SOP #: **02-02-a5**

Rev. Date: 04/10/15

I. Procedure Name: **Completed Requests**

II. Basic Procedure:

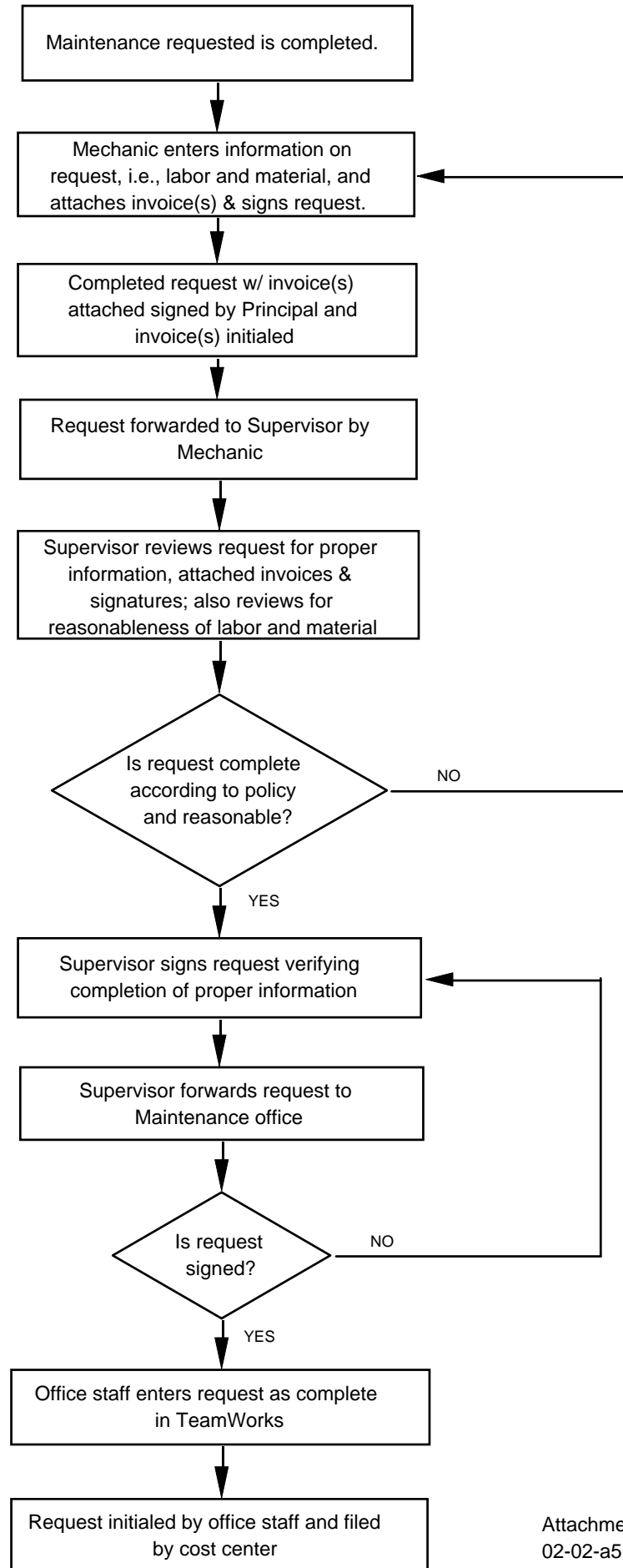
1. Requests for Maintenance Services forms must be signed by Principals/Department Heads or their designee once the requested work is complete. **PRIOR TO SIGNATURE BY PRINCIPALS/DEPARTMENT HEADS**, the form should contain the following information: mechanic's name, labor hours needed to complete the job, description of work performed, any materials used from truck inventory or vendor purchases and the mechanic's signature on the appropriate signature line. All invoices and/or warehouse requisitions should also be attached prior to sign-off and initialed by the Principal/Department Head. (See Attachment #1)
2. The mechanic will return the completed Request for Maintenance Services form with any associated invoices attached to the shop Supervisor. The Supervisor will verify information on the form and complete cost information (labor cost, materials cost, grand total). The Supervisor will sign the form on the appropriate signature line and return the form to Maintenance Office Clerks for processing. (See Attachment #2)
3. The Clerks will verify that all the required information has been signed by the Principal/Department Head or designee, the mechanic completing the work, and the appropriate shop Supervisor. If any materials have been purchased, a copy of the invoice and/or warehouse requisition should be attached and initialed by the Principal/Department Head or designee and shop Supervisor.
4. Incomplete requests will be returned to the Supervisor to rectify. Requests for Maintenance Services that meet all requirements will be closed and filed by cost center on a daily basis. (See Attachment #3)
5. At the end of each month when the data Clerks have finished entering all of the requests for that month, remove each cost center's requests, staple them together, label them with the month and year and file them in the file drawer provided.

III. Contingencies/Variations:

1. During Christmas holidays or summer vacation period, if there is no one at the school to sign the work request indicating the work has been completed, return this work request to your supervisor. The supervisor will attempt to contact the Principal in person or by telephone or email. If repeated attempts are unsuccessful, the supervisor will then verify that the work has been completed and forward the request to the Maintenance Office for processing. The completed request and invoices will be processed then returned to the supervisor to be held and to have signed once the appropriate persons return to work.

Standard Operating Procedure: **Requests for Maintenance Services**

**Completed Request for
Maintenance Services
Sign-Off Process**



I. Procedure Name: Safety Inspection Request Submission

II. Basic Procedure:

1. Safety Inspection reports are received by fax from inspecting agency. The department secretary reviews inspection report to determine if items listed require Maintenance action.
2. If it is determined to be a Maintenance function, the secretary enters the information into system (TeamWorks) and a work request number is assigned. The work request is opened and a shop is assigned. The request is placed in the appropriate shop mailbox to be picked up and scheduled by the Supervisor.
3. If an inspected item is of an urgent nature or is a high priority, the inspecting agency's representative telephones the item in to the department secretary and a work request is immediately assigned and the work is dispatched to the appropriate Supervisor for action.
4. If dispatched, the Supervisor name and the time of dispatch are noted on the work request and placed in the appropriate shop mailbox.

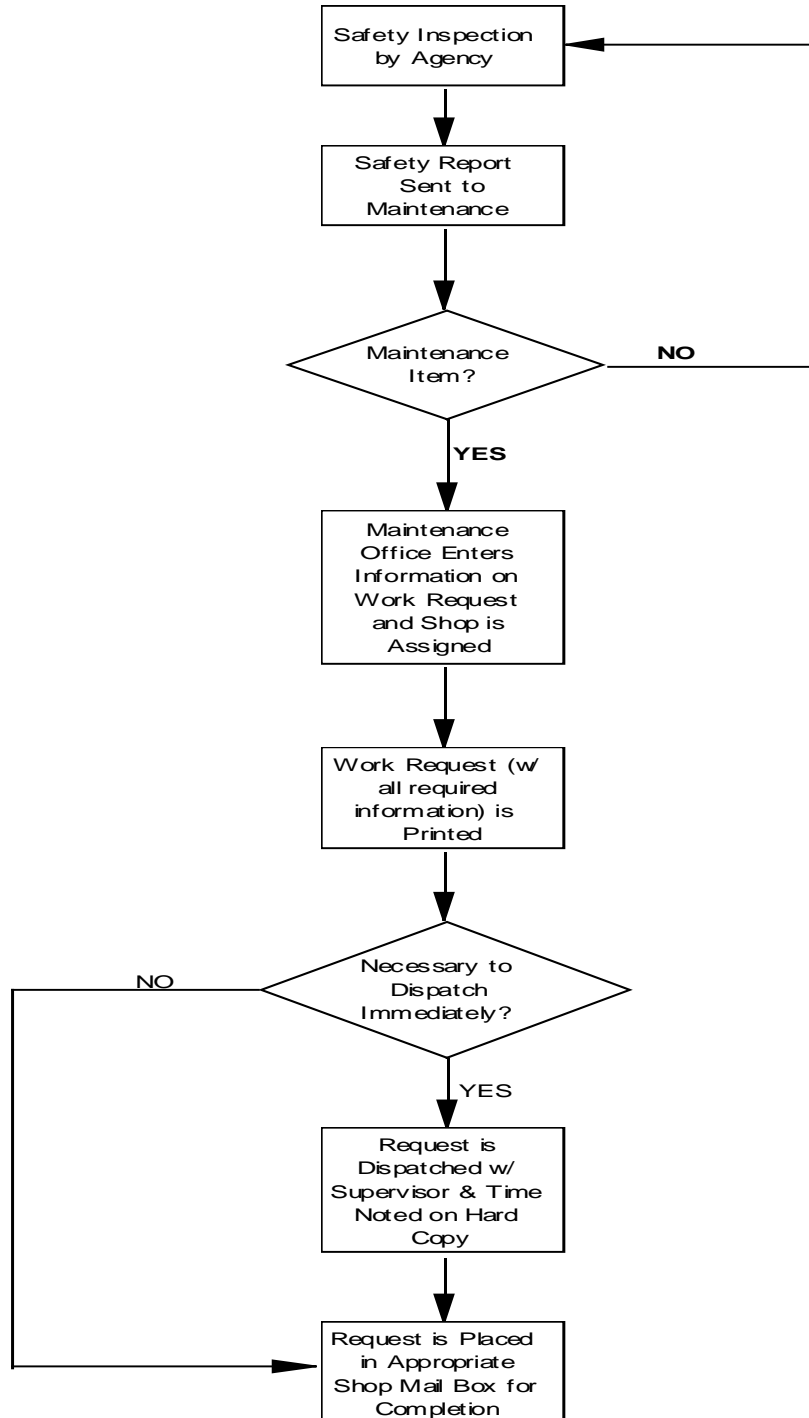
III. Contingencies/Variations

Extreme emergencies that jeopardize safety or facility assets are submitted by telephone directly to the department secretary by a representative of the inspecting agency.

1. When telephone calls are received for emergency safety inspection items, all pertinent information is entered into the system and a work request number is assigned. The secretary opens the request and assigns a shop.
2. The work request is given to the Dispatcher for immediate dispatch to the appropriate Shop Supervisor.

Safety Inspection Request Submission

PROCESS FOR SUBMITTING SAFETY REQUESTS



**Attachment #1
02-02-a6**

Standard Operating Procedure: **Requests for Maintenance Services**

Author: MRP

Department: **Maintenance Services**

Issue Date: 12/18/02

SOP #: **02-02-a7**

Rev. Date: 10/15/10

I. Procedure Name: After Hours Requests

II. Basic Procedure:

1. The Maintenance Services Department provides emergency night and weekend services to schools and offices with the School District.
2. A response team is created annually in accordance with the Master Contract. A rotation schedule is prepared and distributed to key personnel. If an emergency situation occurs, the district personnel can contact the appropriate person on call for that week via the emergency response team cell phone number 850-554-4221 or by dialing the emergency maintenance telephone number 850-438-0701. A new person is on call beginning each Wednesday afternoon and rotates off the following Wednesday morning.
3. Emergency maintenance problems will be corrected or secured to be finished on the next workday. In the event that a problem is not fully rectified it is the responsibility of the on-call person to submit a work request to the Maintenance Office at the beginning of the next workday.

III. Contingencies/Variations:

1. Extreme emergencies that will affect the operation of school the following day will be communicated to the Director and Assistant Director and the Assistant Superintendent for Operations will be notified.

I. Procedure Name: **Normal Workday**

II. Basic Procedure:

The normal workday for the Maintenance Department is from 7:00 AM to 3:30 PM Monday through Friday. Employees should be in their shops and ready to work at 7:00 AM. There are times that employees will be required to work different hours and different workdays so that school functions will not be interrupted. This will be done in accordance with contract language regarding this change of hours.

III. Contingencies/Variations:

None

I. Procedure Name: **Breaks**

II. Basic Procedure:

Each employee shall receive two uninterrupted Supervisor approved (except in case of emergency work) breaks each day. Each break shall be fifteen minutes for employees who work eight hours per day. Breaks that are interrupted by emergencies shall be rescheduled by the supervisor in consultation with the affected employee(s). Breaks shall be taken when they will cause the least disruption of work activities. Individual circumstances may be considered by the supervisor to allow a variance from the established schedule on a case-by-case basis. Each employee assigned to work during normal mealtimes shall be provided with a thirty-minute meal break. Breaks shall not be taken when first reporting to work in the morning or just prior to leaving your work site in the afternoon. Travel time involved in breaks and lunch periods are figured into the fifteen-minute or thirty-minute times you are allotted. (Refer to Master Contracts)

III. Contingencies/Variations:

None

I. Procedure Name: **Tardiness**

II. Basic Procedure:

Nearly everyone is unavoidably late from time to time. It is your responsibility to notify your supervisor when it appears you will be tardy. If you cannot give advance notice, get in touch with your supervisor as soon as possible after your usual reporting time to let them know the reason for your tardiness. If you are more than fifteen minutes late, you will be required to use leave for that time.

III. Contingencies/Variations:

None

I. Procedure Name: **Shop Time**

II. Basic Procedure:

Employees are expected to leave the shop by 7:20 AM and should not return until 3:15 PM unless directed by your supervisor. The first few minutes of each day should be spent gathering tools and materials, completing paperwork, conferring with your supervisor, etc. Exception to this policy will be made only for work required in the shop or to retrieve materials or tools that were unexpectedly needed and as approved by the shop Supervisor.

III. Contingencies/Variations:

None

- I. Procedure Name: **Fire Alarm Systems – Alarm and Trouble Conditions**
- II. Basic Procedure:

The following procedure should be followed by school administrators as a result of a fire alarm system showing trouble or sounding:

1. Regular Operating Hours (7:00 a.m. to 3:30 p.m.)

Call the Maintenance Department primary number 469-5586 (secondary numbers 469-5469 or 469-5585). The responding fire departments are **NOT** authorized to reset alarms. The Maintenance Department Electronics Department or assigned fire alarm contractor will reset panels after the alarm-causing device has been located.

2. After Normal Operating Hours

Call the Maintenance Emergency primary number 438-0701 (secondary numbers 554-4190 or 554-4199). The responding fire departments are **NOT** authorized to reset alarms. The Maintenance Electronics Department representative or assigned fire alarm contractor will reset panels after the alarm-causing device has been located.

Normal Operation:

3. Alarm Condition: (any red light on panel)

School administrators may only reset a fire alarm panel when the alarm has been caused by an activated (pulled) pull station. The exact location of the activated pull station should be noted for inspection by the Maintenance Electronics Department. **NO OTHER DEVICES MAY BE RESET.**

Push the following buttons on the fire alarm or annunciator panel in sequence:

- a. Alarm Silence (push once)
- b. Alarm Acknowledge (if necessary)
- c. Trouble Silence or Acknowledge
- d. Panel Silence (some systems)
- e. Call the Maintenance Department

- I. Procedure Name: **Fire Alarm Systems – Alarm and Trouble Conditions**
- II. Basic Procedure: continued

4. Trouble Condition: (any yellow light on panel)

Push the following buttons on the fire alarm or annunciator panel in sequence:

- a. Trouble Silence or Acknowledge
- b. Panel Silence (some systems)
- c. Enter Maintenance Work Request

IF THE SYSTEM INDICATES TROUBLE, DO NOT RESET THE PANEL OR PUSH SIGNAL SILENCE. BY LAW ALL DISTRICT SYSTEMS MUST REMIND US EVERY 24 HOURS IF TROUBLES ARE LOCATED ON OUR SYSTEMS SO THAT THE TROUBLE SOURCE CAN BE IDENTIFIED.

- III. Contingencies/Variations:

None.

I. Procedure Name: Surplus Procedures

II. Basic Procedure:

1. Upon receipt of the Equipment Transfer/Disposal Form (see Attachment #1) which has been processed by Budgeting, the form will be dated at the top for date of receipt and reviewed for the following:
 - a. Is the material under the disposition cognizance of Maintenance? If so, the form will be compared to any equipment requests from Maintenance and either provided to Maintenance, scrapped or sold at auction.
 - b. Does the form contain material which is construction debris or parts of buildings, etc.? If so, the originator will be notified to dispose of the material locally or through Maintenance Grounds Crew.
2. Upon resolution of the disposition instructions and whether the material is actually equipment, the form will be placed in the active Surplus slot in the Surplus Operations, Maintenance Department.
3. The Surplus Inventory Manager will review requests and schedule pickups.
4. Upon arriving at the pickup site, the driver will report to the office, request a work order, locate the material and verify against the Transfer/Disposal Form. Only material on the form will be processed. Any material not on the form, or having wrong property numbers, will remain at the site and the activity will be notified to process the material properly on another form for submission to Budgeting. Upon leaving the driver will get the work order signed by appropriate personnel.
5. Upon disposition of the assets as predetermined by the Surplus Inventory Manager or other cognizant disposition agencies, the assets will be processed for reissue, scrap, auction, or distribution to other District activities. The form will be annotated with specific disposition of each item and the pink copy forwarded to Budgeting.

I. Procedure Name: **Surplus Procedures**

II. Basic Procedure: continued

6. Reissued Items

- a. Furniture – Inventoried at the Hall Center Gym. When repaired and received into OASIS stock to be reissued in the District.
- b. Other Material – This surplus material could be reissued if the Surplus Inventory Manager thinks it is of use to the District. The Manager contacts the cognizant expert to see if they agree.

7. Scrapped Items

Items that are scrapped are handled in four different ways:

- a. The Surplus Inventory Manager will decide how to dispose of non-reissuable/non-repairable items, i.e., disposed of on site or taken to landfill or scrap dealers.
- b. Metal items that are unusable will be sold as scrap metal. The monies paid are sent to Revenue for deposit into the general fund.
- c. Capitalized computer items are placed on a Scrap Log and are palletized (see Attachment #2). All computers and related peripherals are picked up by a computer recycler for credit to the District. See SOP #07-02-d4.
- d. All other District capitalized items which are not appropriate surplus but are beyond use are placed on a Scrap Log and are viewed by the Surplus Inventory Manager.

8. Auction Items – any item can be set aside for auction.

- a. Does this item have any resale value? (This is a judgment call based on previous auctions and talking with the auctioneer).

I. Procedure Name: **Surplus Procedures**

II. Basic Procedure: continued

9. Scrap and Auction Log

- a. The Scrap and Auction Logs (see Attachment #3) are maintained and are given to Budgeting. They are checked and a final monthly list is prepared by Budgeting for the Board Meeting. A complete list is checked and approved by the Surplus Inventory Manager. This is signed and then returned to Budgeting. Lastly, these lists are sent to the Director – Maintenance Services for his approval and signature. This procedure is in accordance with Section 274.07, Florida Statutes, which requires that authority to dispose of District property be recorded in the official Minutes of the Board Meeting.

III. Contingencies/Variations:

None.

Standard Operating Procedure: **Surplus Operations**

Surplus Procedures

THE SCHOOL DISTRICT OF ESCAMBIA COUNTY Department of Property Accounting 51 E Texar Dr. Pensacola, FL 32503 Phone: 469-5443			EQUIPMENT TRANSFER/DISPOSAL FORM		
INSTRUCTIONS: Pick-up equipment at McMillan Center					
Issuing School/Dept McMillan Center FRC		Cost Center # 0741		Move Order # 44353	
Receiving School/Dept Warehouse		Cost Center # 5004		INTERNAL USE ONLY Log Date <u>8/6/02</u> Date Completed _____	
PROPERTY NUMBER	QTY	ITEM DESCRIPTION	ACQ. TYPE	FINAL DISPOSITION/ MAINTENANCE ACTION	TOTAL \$ VALUE
256409	1	Laser Writer Select Printer	NI	Scrap 1525	
Sample Attachment (!) IN PICKENS					
TOTAL <u>Sept 82</u>					
Signature <u>[Signature]</u>		Issuing Principal/Dept Head		Date Issued 07/30/02	
Driver Signature <u>[Signature]</u>		Driver Name <u>[Signature]</u>		Date Picked Up 8/15/02	
Signature <u>[Signature]</u>		Receiving Principal/Dept Head		Date Delivered	
9600-WARE-006 Rev 26 Aug 00 WAREHOUSE COPY					

**Attachment #1
07-02-d1**

Standard Operating Procedure: Surplus Operations



Surplus Procedures

July 2002 Pg 2

SCRAP LIST Attachment (2)

Property Number	Serial Number	Item Description	BIOM CUB	QTY	LOC	ACZAS	PRICE	YR. ACQ.
		Perforce Computer	46551 0921	1	742			
		Monitor	"	3	743			
		Disk Drive	"	2	744			
		CD Player	"	1	745			
		Imagecube Printer	"	3	746			
		Monitor	46553 0921	7	747			
		Printer	"	5	748			
236535		Laserwriter	"	1	749			
		Zoom Modem	"	1	750			
		Apple Computer	46554 0921	5	751			
241376		Apple Computer	"	1	752			
241382		"	"	1	753			
241387		"	"	1	754			
241388		"	"	1	755			
241396		"	"	1	756			
241402		"	"	1	757			
242710		"	"	1	758			
247221		"	"	1	759			
247309		Powertak 570	"	1	760			
261623		"	"	1	761			
263450		"	"	1	762			
		Monitor	46552 0921	4	763			
		Printer	"	1	764			
229191		Apple II GS	"	1	765			
		Monitor	43462 0301	1	766			
		Power Mac	"	1	767			
		Screen	"	3	768			
		Map	38763 0301	1	769			
		Emerson VCR	"	1	770			
		Cassette Recorder	"	1	771			
		Reagan Precious	"	2	772			
		Fibonacci Precious	"	9	773			

I certify that the above items should go on the Scrap List.

By:  Date: 5/29/02
 Received in Property Accounting by:  Date: 6/24/02
 All scrap lists must be received by Property Accounting, no less than seven (7) work days prior to Board Agenda due date. Lists accepted by Property Accounting after that deadline will not be considered for submission to Board for an additional thirty (30) days after receipt.

Attachment #2
07-02-d1

Surplus Procedures

June 22 Pg 1

SEALED BID / AUCTION LIST

Attachment #3

PROPERTY NUMBER	SERIAL NUMBER	ITEM DESCRIPTION	MO #	CC#	ITEM LOC#	LOCATION	COMMENTS
206214		ELECTRIC WIRES EX KEU HWKLS	46029	0351	335		
200894		6 DOORER CHAD CATHOLIST	46029	"	336		
206866		PORT SCALPE OVERHEAD PROT	42516	0661	337		
224666		OVERHEAD PROTECTION	11	"	338		
	C-58671	OVERHEAD PROTECTION	11	"	339		
	C-5869	OVERHEAD PROTECTION	11	"	400		
26802000		MARQUEX VCR	39785	0061	401		
151279		METAL FILE STAND	11	"	402		
179030		METAL SHOCK DOOR CHAIR	11	"	403		
		THREE TIER METAL CART	11	"	404		
232230		KID'S VACUUM	44505	0151	405		
221173		Steel Saw	46408	0671	406		
223238		"	"	"	407		
164088		Ball Press Delta	"	"	408		
		Locker Unit (2)	"	"	409		

I certify that the items listed above should go to the Escambia County School Board for approval to sell by Sealed Bid/Auction. The proceeds use of which is unreserved, or otherwise, or which serves no useful function to the School District.

Signed: [Signature] Title: [Title] Date: 5/6/02

Received in Property Control By: [Signature] Title: [Title] Date: 5/6/02

Sealed Bid Lists must be received by Property Control no less than seven (7) work days prior to Board Agenda due date. Lists accepted by Property Control after that deadline will not be considered for submission to Board. For an additional thirty (30) days after receipt.

All VOB and Chapter 1 items must have prior written approval before being placed on Sealed Bid/Auction List.

- I. Procedure Name: **Customer Surplus Guidelines**
II. Basic Procedure:

The Surplus Property Program picks up and processes over 15,000 items annually, turned in by over 100 customer schools and departments, which must be processed in accordance with strict regulations of responsibility and control. In addition, it operates the Reissuable Furniture Program and assists the Warehouse in the student Furniture Replacement Program. These functions are handled by Surplus Operations when necessary or available. In order to maximize their ability to serve the greatest number of customers in the most efficient manner, the following policies, guidelines and beneficial suggestions are provided:

1. **Viewing Reissuable Furniture will be on an appointment only basis, every Wednesday afternoon from 11:30 a.m. to 3:00 p.m.** Please contact the Surplus Inventory Manager at 469-5472 to make an appointment. It would be helpful if you could have screened the OASIS data base or the Warehouse Catalog (paper or website) with the Item ID of the piece you are interested in to determine availability. If you leave a voicemail message, ensure you provide your name, telephone number, and the type of item for which you are looking. If you are seeking an appointment, please specify the time you are requesting.
2. **The following guidelines will greatly speed up the process for material turned in for surplus pickup:**
 - Surplus equipment can only be picked up on an Equipment Transfer/Disposal Form. Telephone calls are not a substitute for submission of the form.
 - Send a form in as soon as material is identified as surplus – do not wait to fill up a form. Many forms with one or a few items can be picked up by a Warehouse driver on a delivery run, whereas forms that have been held to consolidate large amounts of material over time require special planning and large resource allocation by Surplus Inventory Manager.
 - Send your completed Equipment Transfer/Disposal to Budgeting for processing. Do not send it directly to Maintenance Services. This only delays the turnaround time. Forms are usually processed in the order they are received.
 - Ensure that only those items listed on the Equipment Transfer/Disposal Form are ready for pickup. Items not on the transfer form which have not been processed by Budgeting cannot be picked up.

I. Procedure Name: **Customer Surplus Guidelines**

II. Basic Procedure: continued

- Material on the transfer form should be staged together, if at all possible, and be accessible. Some schools list room numbers where the material is located which does help.
- Furniture and Property Numbered items should not be piled in a heap or scattered throughout a school. If the items are in various areas, please ensure a knowledgeable guide can be provided to show Surplus Operations personnel to the material.
- **If material listed on the Disposal Form cannot be found, it will be lined through and annotated as such. The originator's copy will be returned with annotations.**
- The Equipment Transfer/Disposal Form is for surplus furniture, equipment and tangible personal property of a non-consumable nature with a normal life expectancy over one year (Chapter 274, Florida Statutes). Please do not list construction debris/parts of buildings such as doors, frames, windows, glass, fence posts, concrete, blinds, scrap lumber or metal, nor office consumables such as paper, staplers, trash cans, floor mats or computer software, etc. These items can be disposed of locally or contact Surplus Inventory Manager for removal assistance.
- Should you have further questions regarding surplus procedures, please contact the Surplus Inventory Manager or the Maintenance Services Department.

III. Contingencies/Variations:

None.

I. Procedure Name: Auction Responsibilities

II. Basic Procedure:

1. Surplus Inventory Manager screens incoming surplus to establish appropriate disposition method: auction, scrap, refurbish for redistribution or redistribute as is. Surplus Inventory Manager shall notify the appropriate functional specialist for disposition assessment.
2. Surplus Operations will pick up surplus property from schools and departments and document list(s) of material with appropriate information for submittal to the Budgeting Department.
3. The Budgeting Department will review list(s) of materials submitted for disposition by Surplus Operations and submit final list(s) for School Board approval for appropriate disposition, scrap vs. auction and provide a copy of Board approved auction and scrap lists to Surplus Operations.
4. The Purchasing Department will be responsible for soliciting bids or quotes for auctioneer services, assessing needs and contracting for services.
5. Upon accumulation of sufficient material for auction Surplus Operations will notify the Purchasing Department to request an auction date be set with the auctioneer. Surplus Operations will insure all approved material is tagged with the auction item number. Surplus Operations will notify Budgeting of auction date and time.
6. Upon setting the auction date, Maintenance Services will send a proposed public notice providing an overview of the auction to Public Relations for insertion into local newspapers three to four weeks before the event.
7. Auctioneer will be responsible for the following actions related to the auction of surplus materials:
 - a. Review list(s) submitted and establish lots. Document disposition of property number within each lot;
 - b. Advertise sale;
 - c. Conduct Auction;
 - d. Supervise pickup of materials;
 - e. Submit final list(s) to the Budgeting Department with disposition of all sales information, who, what, for how much;
 - f. Submit copies of sales receipts to Budgeting;
 - g. Submit a check for auction proceeds less fees to Revenue Department.

I. Procedure Name: **Auction Responsibilities**

II. Basic Procedure: continued

8. The Surplus Inventory Manager will be responsible for the following actions:
 - a. Requisition and coordinate with the Purchasing Department for the procurement of auctioneer services;
 - b. Oversee auction on behalf of District;
 - c. Verify list of “no sale” items agrees with items physically present after auction.

9. The Budgeting Department will be responsible for the following actions related to auction:
 - a. Monitor and review sales;
 - b. Reconcile auction list to official Board approved auction list;
 - c. After payment is received from auctioneer, reconcile funds received with auction sales records;
 - d. Provide a list of “no sale” items to Surplus Inventory Manager for verification that items remain after completion of auction.

10. The Budgeting Department will be responsible for removing auctioned assets from the District’s property records.

III. Contingencies/Variations:

None.

I. Procedure Name: Surplus Technology Disposal

II. Basic Procedure:

The following is the new policy and procedures for the pickup of surplus computers, copiers, TV's and electronic components. Submission of an Equipment/Transfer Disposal Form will remain the same, with any exceptions noted within the procedures.

Background: The number of surplus components processed has more than doubled from approximately 12,000 in 1995 to over 24,000 in 2005 while manpower has remained at two. Eighty percent (80%) of surplus is computers and electronic devices. The State Auditor General has issued a mandate for the destruction of computer hard drives which is beyond the economic capability of Information Technology personnel to handle organically. The State has a commercial recycler on contract (Creative Recycling Systems, Inc.) that will pickup computers and electronic devices from school locations and destroy the hard drives at a charge to the District.

1. A commercial contractor or Surplus Operations will pick up computers, copiers, TV's and electronic components from schools based on Equipment Transfer/Disposal Forms submitted as normal to the Budgeting Department for processing. The schools will be notified by the Surplus Inventory Manager regarding when to expect the contractor.
2. Computers, computer related items and copiers should be put on separate Equipment Transfer/Disposal Forms. Do not add other items such as furniture, lawn care, shop equipment, etc., to that form. It will be lined out or rejected by Budgeting and sent back to be resubmitted.
3. It is the school's responsibility to insure that the material is consolidated and easily accessible. If the material is scattered or difficult to retrieve, the contractor will refuse pickup. Appoint a knowledgeable point of contact that can assist the contractor in locating the items upon arrival. All computers must be disconnected and cables removed.
4. IT IS THE SCHOOL'S RESPONSIBILITY TO INSURE THAT THE MATERIAL ON THE TRANSFER/DISPOSAL FORM, PARTICULARLY PROPERTY NUMBERED MATERIAL, IS CORRECT AND REPRESENTS THE ACTUAL MATERIAL. The contractor will do a line item count of property numbered items. If the quantities match, the contractor will remove the material without further verification.

I. Procedure Name: **Surplus Technology Disposal**

II. Basic Procedure: continued

5. If the contractor cannot match the line item quantity on the form with the physical count of the property numbered items, he will do the verification at a cost to the District of \$40.00 per hour. **IF A SCHOOL FAILS TO COMPLY WITH PROCEDURES AND THEREBY CAUSES EXPENSE TO THE DISTRICT, THE CONTRACTOR COST MAY BE CHARGED TO THE SCHOOL.**
6. It is most important that assets with property numbers be segregated from other material for easy access and verification count if necessary. **Put all CPU's together so that their property numbers can be easily verified.** If possible, items such as keyboards, mouse and disk drives can be boxed separately and listed on the Transfer/Disposal Form as a line item, such as one box of keyboards, one box of mouse, etc. **THIS GROUPING ONLY APPLIES TO NON-PROPERTY NUMBERED ITEMS.**
7. Provide the following information by email to the Surplus Inventory Manager: school name, principal name and telephone number, two alternate names and telephone numbers of people knowledgeable of the material.

Contact the office of the Surplus Inventory Manager if you have questions or need further instruction.

III. Contingencies/Variations:

None.

I. Procedure Name: Moving Services and Options

II. Basic Procedure:

Purpose: To propagate options for moving furniture and material from one location to another

When a requirement for moving furniture and/or material from one location to another arises, there are several options to accomplish the transfer:

1. Use organic resources, i.e., do it yourself with available personnel.
2. Contract with the District-approved moving company at the negotiated rates. This would necessitate use of school or departmental funds, which may need to be reprogrammed for a move. An example of the rates are:
 - a. Rate for a truck and driver, M-F, 7:30 a.m.-4:30 p.m. is \$51.75/hour;
 - b. Rate for each worker, worker may be required without a truck, M-F, 7:30 a.m.-4:30 p.m. is \$20.90/hour.

Other rates and contact information are available from the Purchasing Department.

3. If option 1 or 2 cannot be accomplished, and the request is simply to move material from one location to another, a work order can be submitted to the Maintenance Services Department. Depending on Surplus Operations and Grounds Crew availability and workload, a time will be scheduled to accomplish the move. For surplus material moves, a material/equipment transfer form should be submitted to initiate the transfer. A work order will be generated at the time Surplus Operations staff arrive at your site.

NOTE: Packing is the responsibility of the requestor. Boxes, wrapping paper and tape may be gathered from various sources or purchased from the moving vendor. Contact the vendor for sizes and prices. The vendor will accept the District credit card for supplies. For safety, all file cabinets and desks must be emptied and packed beforehand.

III. Contingencies/Variations:

1. Large scale moves, such as closures and consolidations, will be under the auspices of the Surplus Inventory Manager and funded by the District.
2. Moves necessitated by hurricanes or other weather disasters or emergencies will be at the direction of the Assistant Superintendent of Operations and will include all necessary departmental resources as necessary.



Escambia County
School District

Escambia County Florida



Maintenance Services Department
Policies and Procedures Manual

Section 3
General Employee
Requirements



MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL

TABLE OF CONTENTS

SECTION 3: General Employee Requirements

- a. Dress Code / Uniforms
 - 1. Dress Code
 - 2. Uniforms
- b. Radio Usage
- c. Reporting to School Office

I. Procedure Name: **Dress Code**

II. Basic Procedure:

All employees are expected to dress in a professional manner and in such a way that is appropriate for a school environment.

1. Any garment or object with obscene or offensive language or drug, tobacco or alcoholic beverage advertisements on it may not be worn.
2. Employees may not wear tank tops or halter-tops.
3. Shirts must be worn at all times.
4. The waistband of shorts, slacks, skirts and similar garments shall not be worn below the hips.
5. No spandex-type material garments shall be worn.
6. Some type of shoes with soles (except sandals) must be worn at all times.
7. Socks must be worn at all times.
8. Shorts may be worn during summer months.
9. Shorts must be knee length, hemmed, and present a professional appearance.

III. Contingencies/Variations:

Reference SOP #02-03-a2 for all uniform related issues.

I. Procedure Name: Employee Uniforms

II. Basic Procedure:

The purpose of this Standard Operating Procedure (SOP) is to provide consistent, uniformed appearance for the Maintenance Department personnel. Uniforms identify Maintenance personnel to the customers and stakeholders of the Escambia County School District (ECSD), which includes the general public, District staff, and school-based Administrators and staff.

A. Scope

Maintenance employees are expected to represent the Maintenance Department and the District in an admirable manner both in conduct and appearance during business hours and/or when representing the Maintenance Department or the District. This SOP will identify uniform requirements, give direction for proper uniform protocol, and provide inventory details. All personnel, excluding office-based personnel, shall comply with this uniform SOP at all times.

B. Procedures

1. Initial Issuance

Each employee shall be issued an appropriate set of uniform clothing as further defined in Appendix A. New employees shall be issued new uniforms within the first month of service. Until the provided uniforms are available, the employee is required to wear appropriate clothing according to their classification and work requirements as set forth by the Department and the employee's immediate Supervisor.

2. Documentation

When issued a uniform, or any part thereof, the employee shall be required to complete and sign the "Uniform Inventory Form." This form shall also be used to account for uniform items required to be returned at an employee's end of service. This documentation will be administered and kept by the Director's Secretary.

3. Responsibility and Maintenance of the Uniform

All employees are responsible for the overall condition of their uniform items. A weekly laundry service is provided at no charge to the employee for the cleaning of uniform items. This service is optional.

(Continued on next page)

4. Use

Unless otherwise directed by a Supervisor, the Assistant Director, or the Director, uniform clothing shall be worn according to this SOP during all scheduled working hours or periods when performing regular and official District duties.

Employees who fail to abide by the Uniform SOP will be progressively counseled and asked to correct the non-compliance. If an employee must be sent home to change clothing in order to correct a violation, employee accrued leave shall be used for the time away from the job.

Frequent or intentional disregard of the Uniform SOP may result in disciplinary action.

Uniform items shall **not** be worn by themselves or in any combination when not performing regular or official District duties. Violations of this policy may be subject to disciplinary action.

While in uniform, employees may find it necessary to make short stops during transit to and from work sites and/or their residence. During these stops in uniform, employees shall be held accountable for any and all actions that may be interpreted as improper, unfavorable, or illegal by a District employee, or could result in negative publicity or adverse public reaction.

5. Replacement

The employee shall keep all uniform items in good repair and serviceable. Items in need of replacement may be submitted to the vendor company for replacement on a case-by-case basis. These items should be reported to the employee's Supervisor and recorded before surrendering the item to the vendor company for replacement.

If a uniform item is lost or needs replacement due to negligence of the employee, the employee will bear the cost of the replacement by reimbursing the cost to the District.

(Continued on next page)

6. End of Employment

Employees shall return all District funded and issued uniform clothing to their Supervisor upon termination of employment. Each employee shall be required to sign a "Uniform Inventory Form" for the Maintenance Department documenting the items listed on the form that are turned in. The Supervisor is also required to sign the form and will return all uniform items and the completed form to the Director's Secretary. The cost of any employer-issued uniform items not returned at the end of employment shall be deducted from the employee's final pay.

III. Contingencies/Variations:

- A. Office-based employees are exempt from the uniform SOP and must abide by the guidelines set forth in the Dress Code SOP # 02-03-a1.
- B. Employees may opt to wear their own pants, shorts, or blue jeans. If electing this option, the color of pant/shorts shall be either khaki or blue.
- C. Reference SOP # 02-03-a1 for all other Dress Code related topics.

- I. Procedure Name: **Radio/Cell Phone Usage**
- II. Basic Procedure:

The radio/cell phone is one of the most useful and valuable tools in the Maintenance Department. Radios/cell phones provide instant communication to the Maintenance Dispatcher, administration, and supervisors as well as from crew to crew. The radios/cell phones are also a very important safety device as many of our maintenance crews work independently. The radios/cell phones are essential in alerting individuals for assistance in case of emergency, such as student fights, unsafe weather conditions, etc. Radios/cell phones save valuable time when troubleshooting equipment. The radios/cell phones are also safety devices that can be used to report illness or injury (heart attacks, accidents, etc.). Radios/cell phones have become essential tools when encountering life safety issues.

1. Each maintenance employee that is assigned a radio/cell phone will be required to have the radio powered on from 6:00 a.m. to 2:30 p.m. or 7:00 a.m. through 3:30 p.m. each work day, depending on the employee's assigned work schedule. Please refer to SOP #07-07-e for radio/cell phone requirements for employees on the Emergency Duty List.
2. Employees who are not required to keep radios/cell phones on 24 hours per day will be responsible for placing radios/cell phones on chargers after normal working hours to enable use on the next work day. Chargers will be available and are to remain in each Maintenance shop. Car chargers will be provided in order to keep the radios/cell phones properly charged throughout the work day and are to remain in the vehicles ready for use. During certain types of emergencies (i.e., hurricanes, etc.) employees may be required to take radios/cell phones home for informational purposes.
3. Maintenance radios/cell phones are for official use only. Maintenance employees are not allowed to make personal telephone calls using the District radio/cell phone. Maintenance employees are not to distribute individual radio/cell phone numbers to school principals or school staff. School principals and staff are to contact the main telephone number of the Maintenance Office when reporting or requesting Maintenance related issues or work.
4. If radios/cell phones, chargers and/or batteries are lost or stolen, the shop supervisor will investigate and document the incident. Occurrences of lost radios/cell phones, chargers and/or batteries that indicate employee neglect will be addressed via the district's progressive discipline process.

- I. Procedure Name: **Radio/Cell Phone Usage**
- II. Basic Procedure: continued

- 5. Employees shall not deliberately attempt to disrupt, destroy or engage in any activities which interfere with or compromise radio/cell phone or G.P.S. operation. This includes, but is not limited to, turning off the radio/cell phone during working hours or disabling the G.P.S. system.
- 6. Alleged instances of tampering with radios/cell phones, chargers, batteries and/or the G.P.S. system will be investigated by the Director – Maintenance Services. Occurrences determined to be a result of employee tampering will be addressed via the district's progressive discipline process.
- 7. During the normal work day, radios/cell phones are to be kept on the employee's person and not left in the vehicle.
- 8. It is each employee's responsibility to report damage, malfunction, poor signal or other problems to their immediate Supervisor. Radios/cell phones should be turned in to the Electronics Shop Supervisor for repair or replacement.
- 9. Maintenance employees are expected to radio their respective Supervisors upon leaving the compound and indicate their first stop. When an employee leaves that location, he/she is expected to radio his/her Supervisor and indicate his/her destination. Each employee is also required to notify his/her Supervisor when he/she begins his/her lunch break and upon return from his/her lunch break.

- III. Contingencies/Variations:

- 1. If employees are unable to reach their Supervisors, they are to contact Dispatch One.
- 2. If employees are not able to reach either Supervisor or Dispatch One, they are to contact Dispatch Two.

Standard Operating Procedure: **Reporting to School Office**

Author: MRP

Department: **Maintenance Services**

Issue Date: 12/13/02

SOP #: **02-03-c**

Rev. Date:

I. Procedure Name: **Reporting To School Office**

II. Basic Procedure:

You are required to report to the school/facility's office when arriving and prior to leaving such location. If you are leaving a school or facility and you are not able to complete the work requested, you are to communicate your progress to the appropriate person in the office prior to departing.

III. Contingencies/Variations:

None



Escambia County
School District
Escambia County Florida



Maintenance Services Department
Policies and Procedures Manual

Section 4
Administration



MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL

TABLE OF CONTENTS

SECTION 4: Administration

- a. General Leave Provisions
 - 1. Leave Spread Sheet
Attachment #1 – Sample Leave Spreadsheet
- b. Purchasing
 - 1. General
 - 2. Acquiring Contracted Services
 - 3. Maintenance Shop Cost Centers
 - 4. Materials Only Purchase Order Numbers
Attachment #1 – Materials Only Purchase Flowchart
 - 5. Invoices
- c. Tools and Equipment
 - 1. New Tools/Equipment
Attachment #1 – New Tool/Equipment Purchase Flowchart
 - 2. Replacement Tools/Equipment
Attachment #1 – Tool/Equipment Replacement Flowchart
 - 3. Warranty
- d. Property Control and Accounting
 - 1. Equipment Loan
Attachment #1 – Equipment Loan Form
 - 2. Key Check-Out
Attachment #1 – Shop Checkout Form
Attachment #2 – Contractor/Vendor Checkout Form



MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL

SECTION 4

TABLE OF CONTENTS – continued

d. Property Control and Accounting – continued

3. Access Key Control

Attachment #1 – Key Distribution form

Attachment #2 – Access Control Best Practices-Food Services

Attachment #3 – Access Control Best Practices-Elementary Level

Attachment #4 – Access Control Best Practices-Secondary Level

Attachment #5 – Lost/Stolen Key Compensation Form

4. Transfer/Disposal of Window Air Conditioning Units

Attachment #1 – Reuse/Dispose Labels

e. Human Resources

1. Staffing

Attachment #1 – Personnel Planning Document

2. New Employees

Attachment #1 – New Employee Checklist

3. Job Descriptions

Attachment #1 – Director II – Maintenance

Attachment #2 – Assistant Director – Maintenance Services

Attachment #3 – Accounting Specialist II

Attachment #4 – Administrative Clerk I

Attachment #5 – Administrative Clerk II

Attachment #6 – Administrative Secretary II

Attachment #7 – Administrative Secretary III

Attachment #8 – Air Conditioning & Refrigeration Mechanic II



MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL

SECTION 4

TABLE OF CONTENTS – continued

e. Human Resources – continued

3. Job Description

Attachment #9 – Carpenter I

Attachment #10 – Carpenter II

Attachment #11 – Construction/Maintenance Supervisor

Attachment #12 – Electrician I

Attachment #13 – Electrician II

Attachment #14 – Electronics Technician

Attachment #15 – Equipment Operator I

Attachment #16 – Equipment Operator II

Attachment #17 – Heavy Equipment Operator

Attachment #18 – Fire Suppression Technician I

Attachment #19 – Fire Suppression Technician II

Attachment #20 – Heating & Ventilation Mechanic II

Attachment #21 – HVAC Technician

Attachment #22 – Industrial Plant Mechanic I

Attachment #23 – Equipment Operator IV

Attachment #24 – Locksmith

Attachment #25 – Maintenance Mechanic I

Attachment #26 – Maintenance Mechanic II

Attachment #27 – Maintenance Worker I

Attachment #28 – Maintenance Worker II

Attachment #29 – Manager IX – Surplus Inventory



MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL

SECTION 4

TABLE OF CONTENTS – continued

e. Human Resources - continued

3. Job Descriptions – continued

Attachment #30 – Office Machine Technician

Attachment #31 – Office Services Assistant

Attachment #32 – Painter I

Attachment #32 – Painter II

Attachment #33 – Pest Control Technician I

Attachment #34 – Pest Control Technician II

Attachment #35 – Plumber I

Attachment #36 – Plumber II

Attachment #37 – Shop Leader - Carpenters

Attachment #38 – Shop Leader – Construction/Maintenance

Attachment #39 – Shop Leader - Electricians

Attachment #40 – Shop Leader - Electronics

Attachment #41 – Shop Leader - Grounds

Attachment #42 – Shop Leader – HVAC Operations

Attachment #43 – Shop Leader – Locksmiths

Attachment #44 – Shop Leader – Office Machines

Attachment #45 – Shop Leader - Painters

Attachment #46 – Shop Leader – Plumbers

Attachment #47 – Storekeeper/Warehouse Technician II

*Attachment #48 – Technician II – Energy Management Control
Systems*

Attachment #49 – Wastewater Treatment Plant Operator II

Standard Operating Procedure: **General Leave Provisions**

Department: **Maintenance Services**
SOP #: **02-04-a**

Author: MRP
Issue Date: 12/16/02
Rev. Date:

I. Procedure Name: **General Leave Provisions**

II. Basic Procedure:

The Master Contract (Articles X.1-X.11) has general provisions pertaining to leave policies. In addition, the Maintenance Department has established the following policies.

All leave requests must be approved and submitted to the Maintenance Office by the appropriate supervisor.

III. Contingencies/Variations:

None

Standard Operating Procedure: **General Leave Provisions**

Department: **Maintenance Services**
SOP #: **02-04-a1**

Author: MRP
Issue Date: 12/16/02
Rev. Date:

I. Procedure Name: **Payroll Leave Spreadsheet**

II. Basic Procedure:

Once all signatures on the required leave forms have been obtained as per 02-01-f2, actual hours worked, annual leave, sick leave, etc., are recorded daily on the Leave Spreadsheet (Attachment #1) for departmental record keeping purposes and submitted to the Payroll Department every two weeks.

III. Contingencies/Variations:

None

Standard Operating Procedure: **General Leave Provisions**

Leave Spreadsheet

	Jul-02													
	1	2	3	4	5	8	9	10	11	12				
WORKED													0.00	WORKED
ANNUAL	3.00												3.00	ANNUAL
SICK	8.00												8.00	SICK
PERSONAL													0.00	PERSONAL
OTHER													0.00	OTHER
WORKED													0.00	WORKED
ANNUAL													0.00	ANNUAL
SICK													0.00	SICK
PERSONAL													0.00	PERSONAL
OTHER													0.00	OTHER
WORKED													0.00	WORKED
ANNUAL													0.00	ANNUAL
SICK													0.00	SICK
PERSONAL													0.00	PERSONAL
OTHER													0.00	OTHER
WORKED													0.00	WORKED
ANNUAL	8.00	8.00			8.00								24.00	ANNUAL
SICK													0.00	SICK
PERSONAL													0.00	PERSONAL
OTHER													0.00	OVERTIME
WORKED													0.00	WORKED
ANNUAL													0.00	ANNUAL
SICK	8.00												8.00	SICK
PERSONAL													0.00	PERSONAL
OTHER													0.00	OTHER
WORKED													0.00	WORKED
ANNUAL						8.00	8.00						16.00	ANNUAL
SICK	16.00												16.00	SICK
PERSONAL													0.00	PERSONAL

**Attachment #1
02-04-a1**

I. Procedure Name: **General**

II. Basic Procedure:

1. Materials or services required by the Shops in order to perform repairs, replacements, etc., are primarily bought through the District's purchasing card program. Work order numbers are to be acquired prior to any purchase. **The accounting specialist will not assign work order numbers.**
2. Purchases totaling \$4,999.99, or less, may be purchased with a purchasing card (P-card). If the total purchase is greater than \$4,999.99, then Maintenance with either:
 - a. submit a requisition for a purchase order in order to make the purchase, or
 - b. request a Single Transaction Limit (STL) increase, in writing, to the Director of Purchasing. STL increase requests must be made by the Director or Assistant Director of Maintenance and will be done on a case-by-case basis in order to make a purchase.
3. Quotes should be obtained prior to any large purchase. Quote requirements are as follows:
 - a. For purchases with a cost of \$7,499.99, or less, one (1) quote is required.
 - b. For purchases with a cost from \$7,500.00 to \$9,999.99, two (2) quotes are required.
 - c. For purchases with a cost from \$10,000.00 to \$49,999.99, three (3) quotes are required.
 - d. For purchases with a cost of \$50,000.00, or greater, an official competitive solicitation (Bid/RFP) must be initiated by the Purchasing Department. This also requires Board approval.
4. Invoices/receipts for all purchases should be submitted to the Accounting Specialist on the next business day. The receipts/invoices are to include the work order number, school name, legible signature of purchaser, and shop supervisor's initials.

III. Contingencies/Variations:

I. Procedure Name: Acquiring Contracted Services

II. Basic Procedure:

1. All contracted services will be funded with Contract Services' budget (Object 350).
2. Contracted services, other than annual agreements, exceeding \$5,000 will require two quotes and, if time permits, three quotes are preferred. Anything exceeding 7,500 requires three quotes. Must get administrative approval by the Director or Assistant Director.
3. Work orders that required contracted services will be coded to Contract Business (CB) and forwarded to the appropriate shop for completion.
4. Work orders assigned to particular shops that require contract services will be re-assigned to Contract Business (CB) coding prior a purchase order being issued.
5. Once the contracted work is complete, the job will be inspected by the appropriate Supervisor and if completed satisfactorily, will have the work order signed off by the school.
6. Invoices shall be attached to the work order and initialed by the Principal or designee.
7. Any labor hours spent by Maintenance Department employees in this process will be entered on the work order prior to sign off.

III. Contingencies/Variations:

None

I. Procedure Name: Maintenance Shop Cost Centers

II. Basic Procedure:

1. Each shop is assigned a cost center number for purchases that are not associated with a particular facility cost center. They are as follows:

Surplus Operations	4110A
Heating & Air Shop	4111A
Carpenter Shop	4112A
Electrical Shop	4113A
Electronics Shop	4114A
Exterminator Shop	4115A
Grounds Crew Shop	4116A
Locksmith Shop	4118A
North End Shop	4119A
Office Machine Repair Shop	4120A
Painting Shop	4121A
Plumbing Shop	4122A
Fire Suppression Systems Shop	4123A

2. Each Maintenance shop Supervisor is provided weekly reports of cost center activity for review. It is the Supervisor's responsibility to check this report against work requests completed during the report period for consistency.
3. Once this check and balance is done, the Supervisor will initial the report and return it to the Maintenance office to be reviewed by the Director and filed.

III. Contingencies/Variations:

None

I. Procedure Name: Materials Only Purchase Order Numbers

II. Basic Procedure:

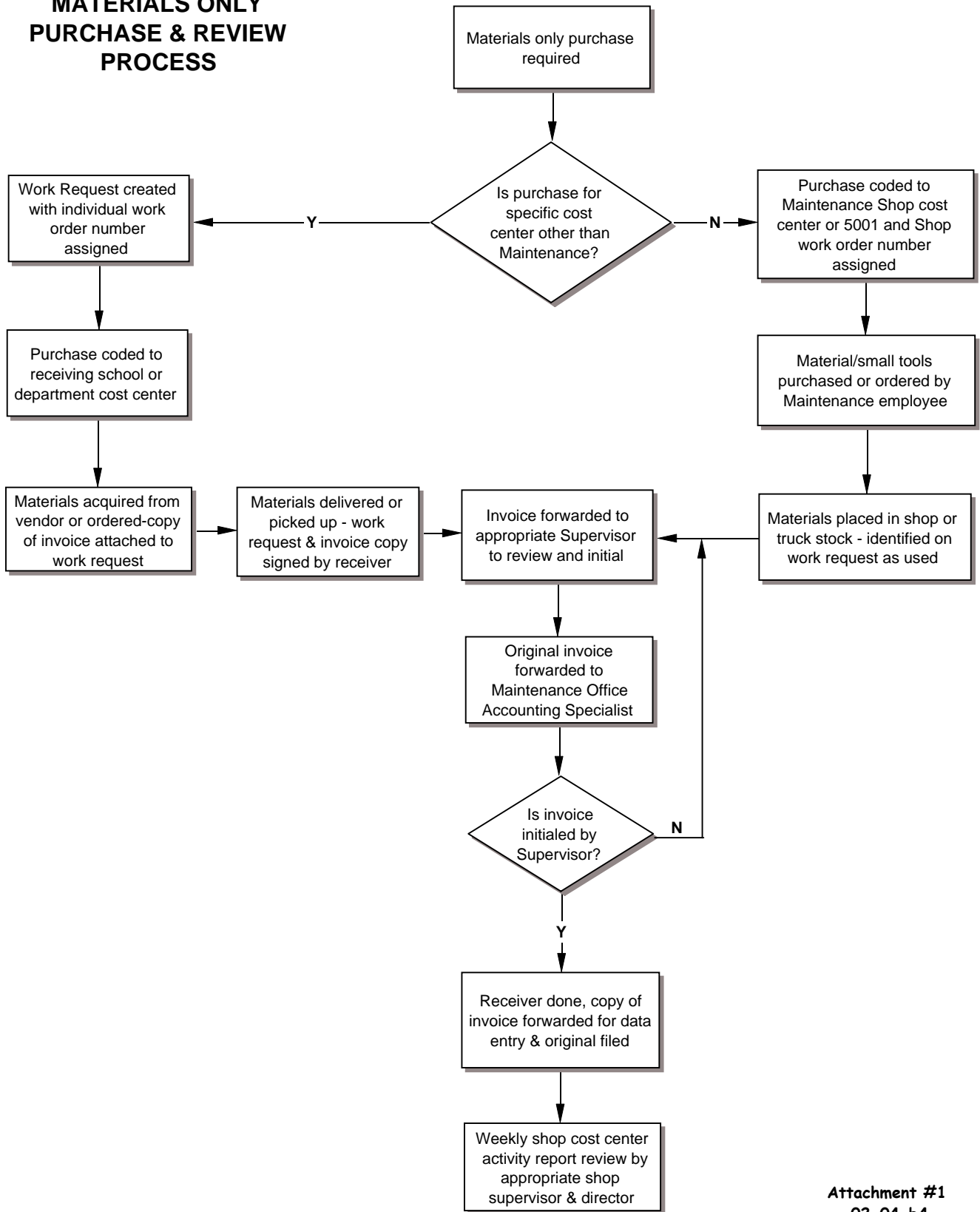
1. If materials are purchased for schools, a work request is required for each purchase with a work request number assigned. When maintenance employees deliver materials, the work request should be complete with labor hours recorded. The receiver is required to sign the work request and initial all purchase receipts attached.
2. If materials are purchased for a Maintenance shop, the purchase is coded to the shop cost center and materials only work order number.
3. All invoices/receipts are forwarded to the Shop Supervisor for review and are initialed by the Supervisor. Invoices/receipts are then forwarded to the Maintenance Office to be processed.
4. Materials only purchases that are not charged to a facility cost center are charged to the shop cost center. (See Attachment #1)

III. Contingencies/Variations:

None

Materials Only Purchases

**IMPROVED
MATERIALS ONLY
PURCHASE & REVIEW
PROCESS**



I. Procedure Name: **Invoices**

II. Basic Procedure:

1. Original invoices are forwarded to shop Supervisors for review and initial prior to being forwarded to the Maintenance office Accounting Specialist II.
2. Original invoices are filed by the Accounting Specialist and initialed invoice copies are attached and filed with the completed Request for Maintenance Services form.

III. Contingencies/Variations:

1. Warehouse requisitions shall be considered invoices and processed as such.

Standard Operating Procedure: **Tools and Equipment**

Author: MRP
Issue Date: 12/11/02
Rev. Date:

Department: **Maintenance Services**
SOP #: **02-04-c1**

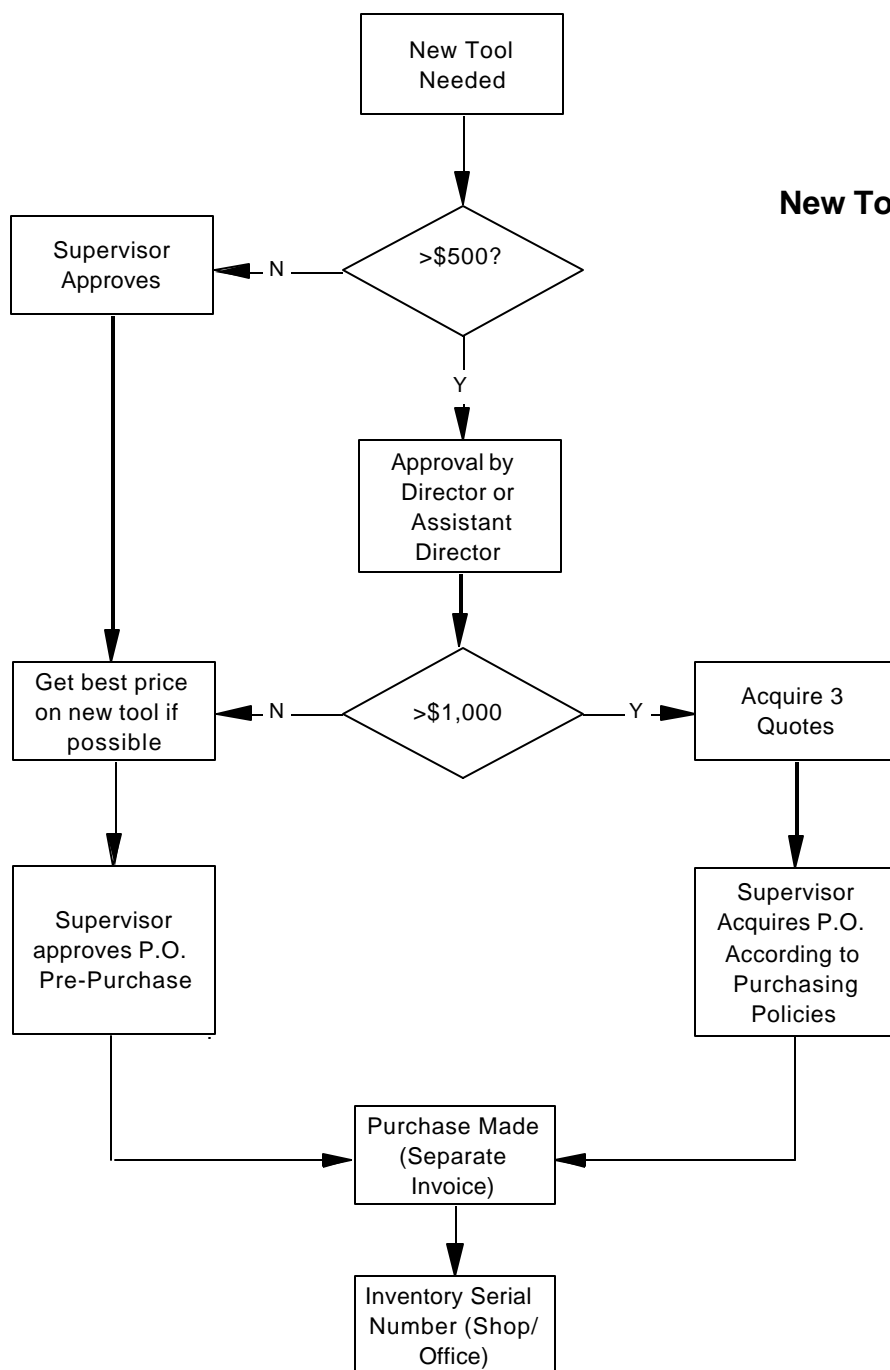
- I. Procedure Name: **New Tools/Equipment**
- II. Basic Procedure:

New tools or equipment that are considered non-replacement require supervisory approval prior to purchasing. If the tool or equipment needed exceeds \$500.00 in cost, administrative approval by the Director or Assistant Director of Maintenance Services is required. If the tool or equipment cost exceeds \$1,000.00, three quotes are required. (See Attachment #1)

All tool or equipment purchases require supervisory approval.

- III. Contingencies/Variations:
None

Tool Purchase (Non-Replacement) Process



New Tool Purchase Process

I. Procedure Name: Replacement Tools/Equipment

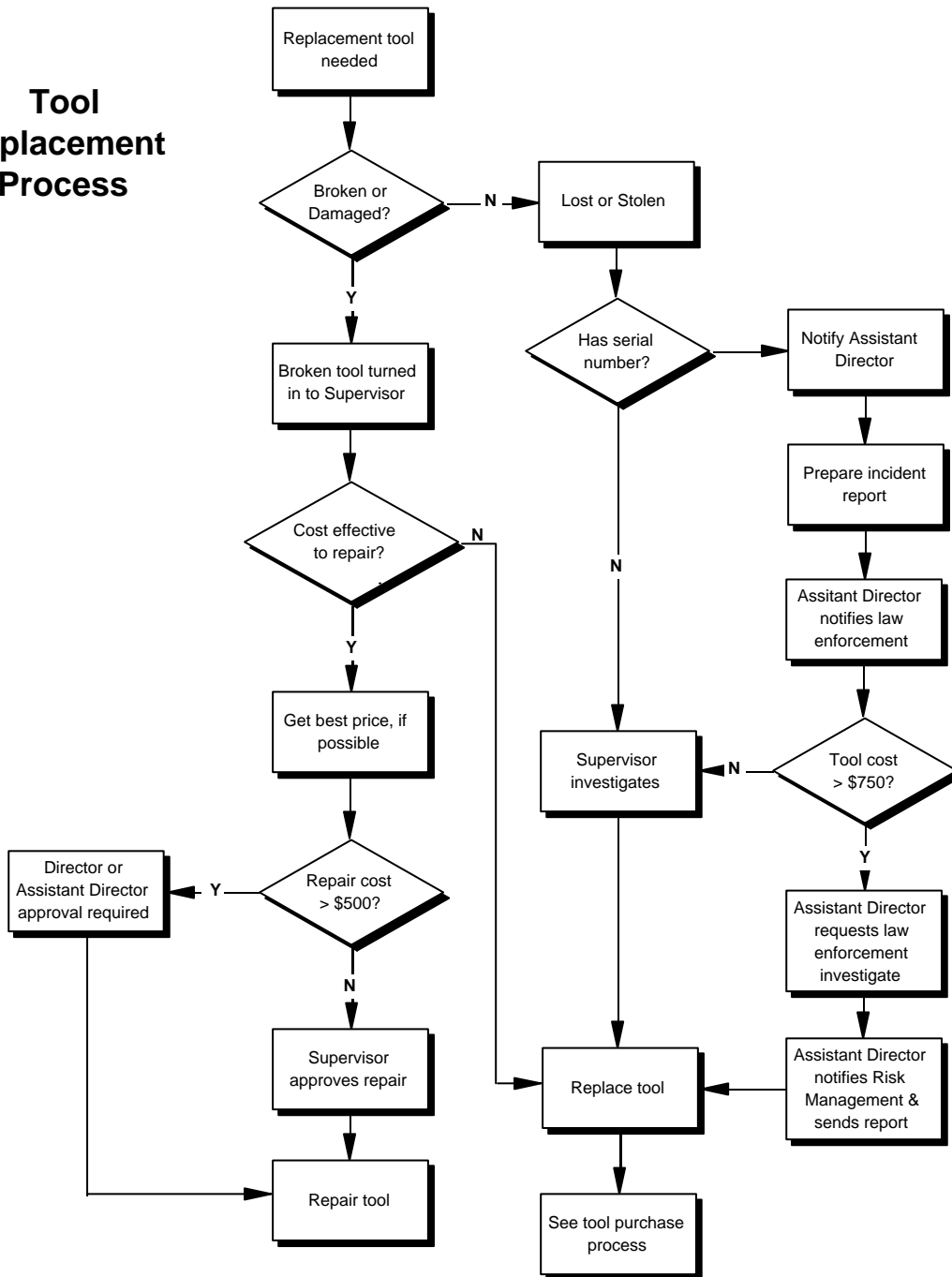
II. Basic Procedure:

1. Tools or equipment that need to be replaced will be turned in to the shop Supervisor for evaluation. The Supervisor will then determine if the tool can be repaired or should be replaced. If the repair cost estimate exceeds \$500.00, approval from the Director or Assistant Director is required. (See Attachment #1)
2. If a tool is lost or stolen, the shop Supervisor will investigate and document the incident. Occurrences of lost tools that indicate employee neglect will be addressed via the district's progressive discipline process.
3. If a tool or piece of equipment that is lost or stolen has a serial number, the shop Supervisor will notify the Assistant Director. If the tool or equipment exceeds \$750.00 in value, the appropriate law enforcement agency will be called to investigate.
4. All tool or equipment purchases require supervisory approval.

III. Contingencies/Variations:

1. If tools or equipment are in need of repair by outside vendors, the shop Supervisor will insure that a repair ticket is received upon delivery of the tools/equipment to the vendor.
2. The repair ticket will list the type of tools/equipment being repaired as well as the property number (if one has been assigned), serial number and model number.
3. The repair ticket should also contain the invoice number and purchase order number assigned.
4. The repair ticket will have the date the tools/equipment were delivered to the vendor and the approximate date for pick up.

Tool Replacement Process



Standard Operating Procedure: **Tools and Equipment**

Department: **Maintenance Services**
SOP #: **02-04-c3**

Author: MRP
Issue Date: 12/11/02
Rev. Date:

I. Procedure Name: **Warranty**

II. Basic Procedure:

1. All tools or equipment purchases are required to be on a separate invoice from other purchases. A copy of the invoice and warranty information will be kept in the shop.
2. If a broken tool or piece of equipment is returned to the Supervisor (is required) to be repaired or replaced, the Supervisor will review the warranty information before approving repair or replacement.
3. If the warranty has not expired, the Supervisor will seek repair or replacement according to the terms of the warranty.

III. Contingencies/Variations:

None

Standard Operating Procedure: **Property Control and Accounting**

Author: MRP

Department: **Maintenance Services**

Issue Date: 12/11/02

SOP #: **02-04-d1**

Rev. Date:

I. Procedure Name: **Equipment Loan**

II. Basic Procedure:

School District equipment is to be loaned for official school district business only and not for personal use. An Equipment Loan Form is required to be completed and kept in the appropriate shop until equipment is returned. Upon return, the date should be entered with initials verifying equipment return. Loan forms should be filed for future reference. (See Attachment #1)

Equipment loan requests initiated by schools or other departments within the District should be done in accordance with standard Work Request procedures.

III. Contingencies/Variations:

None

Equipment Loan Form

MAINTENANCE DEPARTMENT EQUIPMENT LOAN FORM

Date _____

With my signature, I agree to return the item I am signing for within three to five (3-5) working days. Failure to do so may result in not being able to borrow equipment from the indicated shop in future. I understand that this equipment can only be used for official School District business.

Item Name _____

BPI # _____

Shop _____

Date Returned _____

Shop Representative Initials _____

Signature

**Attachment #1
02-04-d1**

Standard Operating Procedure: **Property Control and Accounting**

Author: MRP

Department: **Maintenance Services**

Issue Date: 12/11/02

SOP #: **02-04-d2**

Rev. Date:

I. Procedure Name: **Key Check-Out**

II. Basic Procedure:

1. This Maintenance Office key checkout policy is used for properly checking out keys by Maintenance employees, vendors and/or contractors. A list of schools and departments within the district and corresponding key numbers is kept in the Key Control Book. The office staff for Maintenance Services is responsible for issuing keys.
2. In the event that a school or district facility is closed and entry is needed, keys can be checked out from the Maintenance office by Maintenance employees, vendors and/or contractors.
3. When keys are checked out the following information is logged in the Key Control Book: key set number, # of keys on ring, name of the school or facility, the name of the person signing the keys out, the date of check-out, and the initials of the person issuing the keys. When the keys are returned, the date is noted and the employee checking in the keys initials the Key Control Book.
4. Keys will only be issued to authorized vendors and/or contractors.
5. Vendors and contractors will be required to have picture identification and proof of employment.
6. Keys should be returned as soon as possible (the day or morning after a project is completed).
7. Keys will be logged out and in using the proper log sheets for Maintenance employees, vendor and contractors (see Attachments #1 and #2).
8. The Key Control Book will be reviewed on a bi-monthly basis for delinquencies.
9. Vendors and/or contractors will be contacted by telephone if keys have not been returned by approximated return date.
10. If keys are needed longer than thirty (30) days, they must be returned and rechecked out.

III. Contingencies/Variations:

None

CONTRACTOR/VENDOR KEY CHECK OUT

Date Signed Out _____

Key Set #	# of Keys on Ring	SCHOOL/FACILITY NAME

IF KEYS CHECKED OUT ARE LOST, STOLEN OR NOT RETURNED, THE CONTRACTOR/VENDOR SHALL BE HELD RESPONSIBLE FOR THE COST OF KEY REPLACEMENT OR REKEYING OF THE SCHOOL OR FACILITY (AT THE DISCRETION OF THE SCHOOL DISTRICT).

CONTRACTOR/VENDOR NAME: _____

ADDRESS: _____

TELEPHONE #: _____

PERSON PICKING UP KEYS (PLEASE PRINT & SIGN YOUR NAME BELOW)

PRINT NAME

SIGNATURE

POSITION WITH COMPANY

(APPROXIMATE) DATE KEYS WILL BE RETURNED _____
IF KEYS ARE NEEDED LONGER THAN 30 DAYS, THEY MUST BE RETURNED AND RECHECKED OUT.

MAINTENANCE STAFF ISSUING KEYS _____

DATE KEYS RETURNED _____ PERSON RETURNING KEYS _____

**Attachment #2
02-04-d2**

I. Procedure Name: **Access Key Control**

II. Basic Procedure:

The purpose of this policy is to insure the protection of the students, employees and property of the district, while meeting as many needs of our customers as possible; and to maintain accurate, effective access control of all locking devices critical in protecting all district facilities.

The district's Locksmith Department has overall control of the access key control system, which currently utilizes the Falcon key system. All keys designated for access control for each school or district facility are the responsibility of that facility's Principal, Director, Manager or his/her administrative level designee. This person shall be known as the Facility Access Key Controller and no keys may be issued without his/her consent. All keys issued to authorized individuals shall be signed for on the appropriate form(s).

Access cards will be treated exactly like keys (i.e., lost, stolen, issued, etc.). Collection of access cards when employees transfer or leave the district are the responsibility of the Principal/department head. Principal or department heads where access cards are used must notify the office of Security, Safety and Emergency Operations whenever an employee leaves the department or terminates in order to have the access card deactivated.

District keys shall not be issued or loaned to any individual not previously authorized by the Facility Access Key Controller, nor should they be left unattended, i.e., hanging in doors, left in/on desks, etc. There shall be no spare falcon keys left at any facility, except for exterior door check-out keys designated by the Facility Access Key Controller. All keys are the property of the Escambia County School District and **WILL ONLY BE DUPLICATED BY THE SCHOOL DISTRICT LOCKSMITH DEPARTMENT** with proper authorization.

Anyone violating this policy is subject to administrative disciplinary action by the district. Disciplinary action may include, but not be limited to, a monetary fine and/or written reprimand.

All Assistant Superintendents, Directors, Managers and other administrative officers are responsible for the full implementation of this policy within their respective areas. All records are subject to audit by the Locksmith Department.

I. Procedure Name: **Access Key Control**

II. Basic Procedure: Continued

1. Installation and Issuance

- A. All requests for issuance of keys and re-keying shall be submitted by the Facility Access Key Controller to the District Key Control Manager. The request must be submitted via a Maintenance Work Request form with justification for the key work to be performed and signed by the Facility Access Key Controller.
- B. All requests must be approved by the District Key Control Manager(s). The District Key Control Manager(s) will contact the Facility Access Key Controller if there are any questions or concerns. If there is no response one week after the District Key Control Manager's first attempt to contact the requesting Facility Access Key Controller, the request will be canceled. The Facility Access Key Controller will be provided with a written explanation from the District Key Control Manager(s) for any denial.
- C. For all urgent requests, the Facility Access Key Controller will contact the District Key Control Manager(s) by phone and authorize the order, or the order will be hand delivered to the Locksmith Department. A Locksmith will be notified within 24 hours of a call.
- D. The District Key Control Manager(s) will complete and retain a district-wide key inventory.
- E. The only exception to this section of the policy will be for Facility Management Project Managers securing keys for contractors working in unoccupied areas. In these cases, Project Managers can request and receive keys directly from the district's Locksmith Department, who shall in turn maintain records and obtain signatures for issuance of these keys. Such records shall include the date the keys were issued, when they are to be returned and to whom they were issued. Project Managers will be responsible for insuring keys are returned to the District Key Control Manager(s).
- F. Project Managers requesting keys to occupied areas must contact the Facility Access Key Controller in writing at least two working days prior to the date the keys will be needed. If the Facility Access Key Controller is not known, the Project Manager must contact the district's Locksmith Department. The Access Key Control Director then retains the responsibility to approve the request.

- I. Procedure Name: **Access Key Control**
- II. Basic Procedure: Continued

2. Lost/Stolen Keys

- A. Upon being notified that a key has been lost or stolen, the Facility Access Key Controller must notify the District Key Control Manager(s). A written follow-up statement must be submitted within 24 hours of such occurrence to the District Key Control Manager(s) by the individual who lost the key(s) and the Facility Access Key Controller. This statement must include the last known location of the key(s) when the key(s) was lost or stolen, who the key(s) was issued to, who was last in possession of the key(s) and any other pertinent information related to the occurrence. A copy of this statement shall be kept on file at the facility and the Locksmith Department for three years. If the key(s) is stolen, an investigation will be performed by the Facility Access Key Controller. If the determination is made that the key(s) was lost or stolen due to negligent action on the part of the key holder, disciplinary action will be taken. All findings resulting from such investigation will be forwarded to the District Key Control Manager(s).

The District Key Control Manager(s) shall advise the Assistant Superintendent of Operations, Director of Maintenance and the Safety Division Chief after receiving notification of any key(s) being lost or stolen. The decision to re-key or to duplicate the key(s) is based on consultation between the individuals listed above. The monetary penalties for lost or stolen key(s) due to negligence are as follows:

Master Key	\$100.00
Entry Key	\$100.00
Gate Key	\$100.00
All other facility keys	\$ 50.00 each

- B. If a monetary penalty is assessed, it shall be the responsibility of the Facility Access Key Controller to collect all assessed fines and forward to the District's Revenue Department as per Attachment #5.
- C. In the event a facility key is broken, the remaining portion of the key(s) is to be turned in to the Facility Access Key Controller for replacement.

- I. Procedure Name: **Access Key Control**
- II. Basic Procedure: Continued

Lost/Stolen Keys – continued

- D. If a key is inoperable, the key shall be turned in to the Facility Access Key Controller for replacement.

3. Responsibilities

Listed below are the responsibilities of those individuals tasked with access key control:

ACCESS KEY CONTROL DIRECTOR

The Assistant Superintendent of Operations is designated as the Access Key Control Director and is responsible for the following items:

- In consultation with district's Locksmith Department, approves all new access control systems and modifications to existing systems. The appropriate Assistant Superintendent will determine fund procurement for such an approved project;
- Approves all key fabrication requests;
- Directs designated staff to conduct an access key control system audit as needed;
- Requests Division Chief – Security, Safety and Emergency Operations, to conduct surveys and audits of campus departments and units to determine the level of adherence and implementation of the access key control policy and reports the results of key control record audits of campus departments to the Superintendent and his staff, at regular intervals; and
- Directs designated Locksmith Department employees to oversee the mechanical and automated access control systems.

KEY CONTROL MANAGER

Key Control Manager is an individual in the district's Locksmith Department responsible for managing the keying system. This person(s) is responsible for creating a keying system that insures security to departments occupying buildings or facilities and for coordinating new systems. He/she is responsible for the following:

- Maintains the access key control filing system and records regarding all key systems;
- Fabricates all keys;
- Receives original keys furnished in conjunction with new construction or renovations directly from the manufacturer;

- I. Procedure Name: **Access Key Control**
- II. Basic Procedure: Continued

Responsibilities – continued

KEY CONTROL MANAGER - continued

- Issues all mechanical or electronic access control keys to Facility Access Key Controllers;
- Conducts all maintenance and repair work regarding mechanical or electronic locking systems;
- Maintains up-to-date and accurate key control records;
- Conducts an audit of access key control records as needed.

PRINCIPAL/DIRECTOR

The Principal or Director may choose to serve as the Facility Access Key Controller, (see below), or may appoint an administrative level staff member of his/her school or department to be responsible for these duties. Designation of a Facility Access Key Controller does not alleviate the Principal/Director of the overall responsibility for access key control at his/her facility.

The Principal or department head shall advise the district's Key Control Manager(s), in writing, of the school or departmental administrative staff member assigned the responsibilities of Facility Access Key Controller, and an alternate. The notification should include the administrative staff members' work address and telephone number. The district's Locksmith Department shall be notified if there are any changes to the Facility Access Key Controller.

FACILITY ACCESS KEY CONTROLLER

Facility Access Key Controller shall be a site-based administrator at a given facility or school. The administrator is responsible for coordination and implementation of this policy. The Facility Access Key Controller is responsible for adherence to and implementing the following:

- Maintains accurate records of all access key control activities;
- Orders and issues all department access control keys;
- Recovers access control keys from personnel who retire, are terminated or are transferred to another department;
- Upon being notified that a key has been lost or stolen, notifies the District Key Control Manager(s);
- Reports any failure to recover access control keys to district's Key Control Manager(s);

- I. Procedure Name: **Access Key Control**
- II. Basic Procedure: Continued

Responsibilities – continued

FACILITY ACCESS KEY CONTROLLER – continued

- Stores unassigned departmental access control keys in a secure cabinet/room; and
- Shall develop and maintain a site specific key issuance policy (see Attachment #3 and Attachment #4).

DISTRICT EMPLOYEES

All district personnel are responsible for the following:

- Must sign a Key Distribution Form (Attachment #1) prior to taking receipt of any District key(s);
- Maintain, secure and be responsible for any access control key(s) personally issued to that employee;
- Report loss or theft of access control keys to the Facility Access Key Controller immediately upon discovery of such occurrence; and
- Return all district keys to the Facility Access Key Controller upon retirement, transfer or termination of employment.

4. Definitions

Listed below are definitions pertaining to the language used in this policy:

ACCESS CONTROL - Control of entry to an area by any means (mechanical or electrical).

ACCESS CONTROL KEY - Any key used to gain entry to a controlled system (normally a mechanical key or a card key).

KEY DISTRIBUTION FORM - Form utilized when issuing and collecting all District keys. (Attachment #1)

KEY CODING – Numerical/alpha combinations used to identify the variety of keys utilized within a facility, without jeopardizing security.

KEY CONTROL FILE - Records maintained by the Locksmith Department's Key Control Manager(s), based on requirements put forth by the Superintendent.

- I. Procedure Name: **Access Key Control**
- II. Basic Procedure: Continued

Definitions – continued

LOCKBOX - An access key control system designed for building access to be used by service departments or police/fire personnel.

GREAT GRAND MASTER KEYS (GGMK) - Highest level of access within the district; will access all buildings.

GRAND MASTER KEYS (GMK) - Keys that will access all buildings at a school or facility (except kitchens). (See Attachment #2)

SUB MASTER KEYS (SMK) - Keys that will access a certain area within a school or facility, i.e., administration offices, media center, etc.

CHANGE KEYS (CK) - Keys that access individual lock cylinders, i.e., classrooms, closets, etc.

- III. Contingencies/Variations:
None



THE SCHOOL DISTRICT OF ESCAMBIA COUNTY

Key Distribution Form

30 EAST TEXAR DRIVE
PENSACOLA, FL 32503
PH.850/469-5586, FAX 850/469-5548
<http://www.escambia.k12.fl.us>

MALCOLM THOMAS, SUPERINTENDENT

TO: Principal/Department Head

FROM: Shawn E. Dennis
Assistant Superintendent – Operations

DATE: _____

RE: Key Assignment Authorization

The following employees have received a Falcon key(s), or an electronic access card, and have read and agree to the Access Key Control policy for facility security. All such keys are the property of the School District of Escambia County and must be surrendered to the District upon request. These keys are restricted and each key has been assigned an individual identification number.

Person Receiving Key (Please Print)	Job Title	Room Number	Key I.D.	Signature	Issue Date	Return Date

SED/

Affirmative action / equal opportunity employer

Sample Form – Do not use. Original will be provided upon request.

Attachment #1
05-04-d3

Standard Operating Procedure: **Access Key Control**

Access Control Best Practices

Standard Operating Policy: **Circulation of Kitchen Keys**
Department: **Food Services**
SOP #: **03-02-K7**

Author: JSB/TT/ES
Issue Date: 1/28/03
Revision Date: 8/19/04

I. Policy Name: **Restricted Circulation of Kitchen Keys for Security**

II. Basic Policy:

In the interest of securing expensive food and nonfood inventory stores from theft or unauthorized removal, it is the express policy and recommendation of the District Food Services Department that school kitchen keys be held solely by the principal/assistant principal and the cafeteria manager/assistant manager. Exceptions to this policy must be approved jointly by the Food Services and Maintenance Departments (i.e., Locksmith Shop). Principals and managers, in turn, are directed to maintain the closest control of their site kitchen keys to insure meeting the letter of School District Rule 3.13(5)(b) as follows:

No equipment or supplies shall be taken from the cafeteria by any person for any purpose, exclusive of inter-school transfers by the Director – School Food Services or periodic maintenance functions. This includes not only the food and non-food inventories, but the containers, the leftovers, the garbage, or any refuse from the cafeteria.

Under **no circumstances** are keys to be duplicated for widespread circulation. Because kitchen refrigeration equipment is “off limits” to instructional personnel and school administrative staff, including contracted After School Child Care employees [School District Rule 3.13(4)(b)], because electrical panels are **not** installed in food/nonfood storage areas and because custodial staff have their own mop sink/storage areas outside kitchen spaces, **none** of these employees should have kitchen keys. Additionally, school-purchased ice machines should be installed in dining rooms, if possible, for direct access or, if located in kitchens, should have ice from them available in plastic chests outside the kitchen.

It is important to realize that total food and nonfood inventory value at elementary schools can run as high as \$15,000 and at secondary schools as high as \$19,000. These resources are purchased, largely with federal reimbursement monies, to operate the National School Lunch, School Breakfast and After School Snack Programs, “for the benefit of children using all of the income accruing to the program solely for the operation or improvement of such a program and only for those food service-related purchases permitted by state and federal rules and regulations; ...” (Escambia-Florida DOE Agreement, Part II B.1.).

With respect to penalties associated with loss or theft of Child Nutrition Resources, our Agreement with the State specifies that, “The Department may take such action, including prosecution for fraud under applicable State and federal statutes or initiate a reclaim, if any part of the money received by the Sponsor/Institution, through improper or negligent action, is diminished, lost, misapplied, or diverted from the program.” (Escambia-Florida DOE Agreement, Part II F).

Standard Operating Policy: **Circulation of Kitchen Keys** (8/04) Page 1 of 1

Attachment #2
05-04-d3

ACCESS CONTROL
BEST PRACTICES

ELEMENTARY LEVEL

1. When keys are issued initially, site staff must sign for them and the key number is recorded with their name.
2. At the end of the school year, keys are collected from teachers and custodians, with the exception of the following people who keep their keys for the reasons listed:
 - a. **Principal** – in charge of school.
 - b. **Assistant Principal** – in charge of school when Principal is not available.
 - c. **Secretary** – limited vacation, can check on school if Principal is not available.
 - d. **Data Clerk** – limited vacation, can check on school if Principal is not available.
 - e. **Technology Clerk** – often works with the IT Department on our school computers and network during the summer.
 - f. **Head Custodian** – works during the summer.
3. The only people who are issued a master key are those listed above in #2, a-f.
4. Classroom keys are re-issued when personnel return to work at the beginning of each school year.
5. Staff is cautioned to carefully guard key(s) and that each individual is personally responsible for the safe-keeping of the key(s) issued to him or her.

Attachment #3
05-04-d3

ACCESS CONTROL
BEST PRACTICES
SECONDARY LEVEL

Purpose – Maintain a safe and secure environment while meeting the needs of all stakeholders.

Athletics – All exterior door keys assigned to coaches will only provide access through the necessary PE entrances.

Head coaches for seasonal sports – will be assigned an exterior door key only for the duration of the season. Head coaches involved in year round sports will be assigned an exterior door key annually.

Instructional – Any teacher assigned an exterior door key will only have access through a limited number of doors. This also includes any exterior door key that is checked out on a temporary basis. (This policy will minimize the number of locks the Locksmith will have to change if a key is lost.).

Check-Out – Instructional personnel can request an exterior door key two days prior to key check-out. For a weekend request, the exterior door key must be checked out before noon on Friday and returned the first day back to school. All key requests and check-outs must go through the Principal.

Spare Key Security – Undistributed spare keys shall be secured at all times.

Any employee who is assigned or has checked out an exterior door key is responsible for securing each exterior door prior to departing the building after normal operating hours. Exterior doors should not be propped open under any circumstances. Key designee is responsible for clearing the building prior to securing the building. If a key is lost or stolen, the principal must be notified immediately. In addition, a lost or stolen key report must be filled out and turned in within 24 hours. Duplication or loaning of any key from this school is prohibited. Due to security, liability and the disarray of interior door keys, the designees must only access those areas previously requested. **Any violation of this policy will result in disciplinary action to include, but not be limited to, loss of key privileges.**

This policy is an effort to maintain security while still providing access to personnel.



THE SCHOOL DISTRICT OF ESCAMBIA COUNTY

Lost/Stolen Key Compensation Form

30 EAST TEXAR DRIVE
PENSACOLA, FL 32503
PH.850/469-5586, FAX 850/469-5548
<http://www.escambia.k12.fl.us>

MALCOLM THOMAS, SUPERINTENDENT

TO: Revenue Department

FROM: Facility Access Key Controller _____
School/ Department: _____

DATE: _____

AMOUNT: _____

RE: Monetary Penalty for Lost or Stolen Facility Access Keys

The enclosed fine assessment in the amount of \$_____ for Access Key Control Policy violation at the above referenced facility is being forwarded to the Escambia County School District Revenue Department to be deposited into the General Fund. A copy of this memo is also being forwarded to the Key Control Manager in the District's Locksmith Department for recordkeeping purposes.

c: Key Control Manager, Locksmith Shop-Maintenance Services

Sample Form – Do not use. Original will be provided upon request.

Affirmative action / equal opportunity employer

Attachment #5
05-04-d3

I. Procedure Name: **Transfer/Disposal of Window Air Conditioning Units**

II. Basic Procedure:

When a school or center closes or a window unit replacement retrofit project is planned, the following procedure will be used to ensure proper transfer or disposal of all window air conditioning units:

1. When a school or facility is to be closed and there are window air conditioning units, the Maintenance HVAC Technician assigned to that facility will be responsible for evaluating the units, completing the proper transfer forms, having the forms signed by the appropriate site-based administrator, and transferring the units directly to the new school or facility. If the units are to be scrapped, the Maintenance Department HVAC Technician completes the proper disposal forms and the units are turned over to Surplus Stores for disposal.
2. When a school or facility is scheduled for an HVAC retrofit as part of a Facilities Planning Department project, the Maintenance HVAC Technician assigned to that school or facility will evaluate the units to determine if they can be reissued for use or should be recommended for disposal. If the units are to be reissued, the Maintenance HVAC Technician will complete the transfer forms, have them signed by the appropriate site-based administrator and transfer the units to the new sites. All units to be reissued will be tagged with a sticker (green REUSE). If the units are to be disposed of, the Maintenance HVAC Technician will tag them with a sticker to dispose (red DISPOSE) and the contractor performing the project will be responsible for removing and disposing of the units. The Maintenance HVAC Technician will be responsible for completing the proper disposal forms and having them signed by the appropriate site-based administrator. (See Attachment #1)
3. **NO units will be transferred to the Maintenance Department for storage.**

III. Contingencies/Variations:

None

Standard Operating Procedure: **Transfer/Disposal of Window Air Conditioning Units**

The labels below are to be used to mark window air conditioning units to be transferred or disposed.

If a unit is to be reissued, the green REUSE labels are placed on the units to be reissued and the Maintenance Department Heating & Air Shop will be responsible for transferring to the new site.



If a unit is to be disposed of, the red DISPOSE label is placed on the unit and the contractor or Surplus Stores will be responsible for disposing of the unit.



I. Procedure Name: **Staffing**

II. Basic Procedure:

Maintenance Department Staffing is controlled via the Maintenance Department Personnel Planning Document (PPD)(see a sample of the PPD at Attachment #1).

The Maintenance Department organizational structure is reflected in our introduction to this manual.

III. Contingencies/Variations:

None

SAMPLE of Personnel Planning Document

THE SCHOOL DISTRICT OF ESCAMBIA COUNTY
DEPARTMENT PERSONNEL PLANNING DOCUMENT
2002-2003

4105 - MAINTENANCE SERVICES (page 1 of 2)

Funding Source/Position Title	Position Type	2001-02 Authorized # of Positions	2002-03 Authorized # of Positions	Net Change 2001-02 vs 2002-03 # of Positions
General Fund, Regular Operations (0101)				
Director (M)Maintenance	A	1.00	1.00	0.00
Assistant Director, Maintenance Services	A	1.00	1.00	0.00
Chief-Data Control/Maintenance	P	2.00	2.00	0.00
Air Conditioning & Refrigerator Mechanic I	B	7.00	7.00	0.00
Air Conditioning & Refrigeration Mechanic I	B	8.00	8.00	0.00
Air Conditioning & Refrigeration Shop Leader	B	1.00	1.00	0.00
Carpenter I	B	2.00	2.00	0.00
Carpenter II	B	11.00	11.00	0.00
Carpenter Shop Leader	B	1.00	1.00	0.00
Electrician I	B	2.00	2.00	0.00
Electrician II	B	5.00	5.00	0.00
Electrician Shop Leader	B	1.00	1.00	0.00
Electronics Technician	B	3.00	3.00	0.00
Lead Electronics Technician	B	1.00	1.00	0.00
Equipment Operator II (Truck Driver)	B	3.00	3.00	0.00
Equipment Operator III (Truck Driver)	B	1.00	1.00	0.00
Equipment Operator IV (Truck Driver)	B	1.00	1.00	0.00
Equipment Operator (Truck Driver) Shop Leader	B	4.00	4.00	0.00
Heating & Ventilating Mechanic I	B	5.00	5.00	0.00
Heating & Ventilating Mechanic I	B	1.00	1.00	0.00
Heating & Ventilating Mechanic I	B	1.00	1.00	0.00
Industrial Plant Mechanic I	B	1.00	1.00	0.00
Locksmith	B	3.00	3.00	0.00
Locksmith Shop Leader	B	1.00	1.00	0.00
Maintenance Mechanic I	B	7.00	7.00	0.00
Maintenance Mechanic I	B	1.00	1.00	0.00
Maintenance Mechanic II	B	2.00	2.00	0.00
Maintenance Worker I	B	3.00	3.00	0.00
Maintenance Worker II	B	1.00	1.00	0.00
North End Shop Leader	B	3.00	3.00	0.00
Office Machine Mechanic I	B	1.00	1.00	0.00
Office Machine Mechanic I	B	2.00	2.00	0.00
Painter I	B	7.00	7.00	0.00
Painter II	B	2.00	2.00	0.00
Painter Shop Leader	B	1.00	1.00	0.00

Cost Center 4105

Page 1

See page 2 of Attachment #1

Attachment #1
02-04-e1

THE SCHOOL DISTRICT OF ESCAMBA COUNTY
DEPARTMENT PERSONNEL PLANNING DOCUMENT
2002-2003

4105 - MAINTENANCE SERVICES (page 2 of 2)

Funding Source/Position Title	Position Type	2001-02 Authorized # of Positions	2002-03 Authorized # of Positions	Net Change 2001-02 vs 2002-03 # of Positions
General Fund, Regular Operations (0101) continued				
Pest Control Technician I	B	1.00	1.00	0.00
Pest Control Technician II	B	1.00	1.00	0.00
Plumber I	B	3.00	3.00	0.00
Plumber II	B	4.00	4.00	0.00
Plumber Shop Leader	B	1.00	1.00	0.00
Wastewater Treatment Plant Operator II	B	1.00	1.00	0.00
Welder	B	1.00	1.00	0.00
Accounting Specialist II	W	1.00	1.00	0.00
Administrative Clerk I	W	1.00	1.00	0.00
Administrative Secretary I	W	1.00	1.00	0.00
Administrative Secretary II	W	1.00	1.00	0.00
Air Conditioning & Refrigeration Shop Supervisor	S	1.00	1.00	0.00
Carpentry Shop Supervisor	S	1.00	1.00	0.00
Construction/Maintenance Supervisor II	S	1.00	1.00	0.00
Electrical Shop Supervisor	S	1.00	1.00	0.00
Electronics Shop Supervisor	S	1.00	1.00	0.00
Grounds Maintenance Supervisor	S	1.00	1.00	0.00
Heating & Ventilating Shop Supervisor	S	1.00	1.00	0.00
Paint Shop Supervisor	S	1.00	1.00	0.00
Plumbing Shop Supervisor	S	1.00	1.00	0.00
Total General Fund, Regular Operations (0101)		120.00	120.00	0.00
Public Education Capital Outlay - Painting Project (2048)				
Painter I	B	4.00	4.00	0.00
Total Public Education Capital Outlay - Painting Project (2048)		4.00	4.00	0.00
Total (All Funding Sources)		124.00	124.00	0.00

1 Two Equipment Operator II positions and two Maintenance Worker II positions are part of the In-House Green Cutting Crew
2 Maintenance positions are generally funded through Capital Improvement Tax Construction Fund (2.160)

I. Procedure Name: **New Employees**

II. Basic Procedure:

Welcome to the Escambia County School District Maintenance Department. It is our responsibility to provide appropriate training and a safe working environment for each employee. The attached checklist (Attachment #1) will assist in insuring that you have received all the appropriate training. This documentation will become part of your personnel file. The following policies and procedures will be covered as part of your orientation. Asbestos Awareness, the Right to Know Law (Hazcom, MSDS), Maintenance Purchasing Practices, Leave Policies, and hazards in your new work area. Please initial and date each item upon completion. Please sign and date checklist when all items on check list have be completed.

III. Contingencies/Variations:

None

Standard Operating Procedure: **Human Resources**

New Employee Checklist

Welcome to the Escambia County School District Maintenance Department. It is our responsibility to provide appropriate training and a safe working environment for each employee. This checklist will assist in insuring that you have received all the appropriate training. This documentation will become part of your personnel file. The following policies and procedures will be covered as part of your orientation. Asbestos Awareness, the Right to Know Law (Hazcom, MSDS), Maintenance Purchasing Practices, Leave Policies, and hazards in your new work area. Please initial and date each item upon completion. Please sign and date checklist when all items on check list have be completed.

	<u>Initial</u>	<u>Date</u>
1. I have received the appropriate training on Asbestos in the work place.	_____	_____
2. I have received the appropriate training covering The Right to Know Law (Hazardous Communications and Material Safety Data Sheets – MSDS).	_____	_____
3. I have read and have been instructed in the proper Maintenance Purchasing Practices.	_____	_____
4. I have read and have been informed of the Leave Policies (Annual, Sick, Jury, Compensatory).	_____	_____
5. I have been informed by my immediate supervisor of the Hazards in the Work Place and the safety precautions I must take.	_____	_____
6. I have received and read the Federal Requirements pertaining to the Drug-Free Work Place.	_____	_____
7. I have received a specialized key and personnel verification code from the Transportation Department for the fuel dispensing system.	_____	_____
8. I have received and read Driver Responsibilities: Non-School Bus from the Transportation Department.	_____	_____
9. I have received the appropriate training on the Blood Borne Pathogens Exposure Plan.	_____	_____
10. I received and read the School District's policy regarding conflict of interest.	_____	_____
11. I have received and read information regarding the School District 's Employee Assistance Program.	_____	_____
12. I received the Maintenance Department Policies and Procedures Manual.	_____	_____

I, _____, have completed all the training listed on this checklist.
Print

Employee Signature

Date

**Attachment #1
02-04-e2**

I. Procedure Name: **Job Descriptions**

II. Basic Procedure:

This section pertains to job descriptions of positions located in the Maintenance Department. Each shop will have a master copy of the Policies and Procedures Manual that will include copies of all job descriptions and a master copy is located in the Maintenance Office. Job descriptions for Maintenance positions as well as all other district positions are available on the district's web site under the Human Resource Services Department.

III. Contingencies/Variations:

None



Escambia County
School District
Escambia County Florida



Maintenance Services Department
Policies and Procedures Manual

Section 5
Employee Safety



**Escambia County
School District**
Escambia County Florida



***MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL***

TABLE OF CONTENTS

SECTION 5: Employee Safety

- a. Employee Safety
 - 1. Safety Meetings
 - 2. Confined Space Entry
 - 3. Emergency Rescue
- b. Annual Training
- c. Safety Awareness Program

I. Procedure Name: **Employee Safety**

II. Basic Procedure:

It is every employee's responsibility in the Maintenance Department to see that work is accomplished in a safe manner and to assist in providing a safe work environment for all students and employees.

Employees are to notify their supervisors of any unsafe situation that may exist.

Employees are responsible for marking any work area to keep unauthorized personnel away from any potentially dangerous situation.

You must wear and use any safety equipment required by your employer. If you do not and get hurt, your workers' compensation benefits may be reduced

III. Contingencies/Variations:

None

I. Procedure Name: **Safety Meetings**

II. Basic Procedure:

Safety meetings are routinely held in the individual shops. These meetings are to be held at least quarterly and all employees within that shop are expected to attend.

Copies of the sign-in roster should be submitted to the Director so that permanent records may be established in order to comply with OSHA guidelines.

III. Contingencies/Variations:

None

I. Procedure Name: **Confined Space Entry**

II. Basic Procedure:

"Confined space" means any space fully or partly surrounded by confining surfaces, including, but not limited to, sewers, lift stations, boilers, wet wells and other confining spaces which may contain an accumulation of flammable, explosive, toxic, poisonous or asphyxiate gases or insufficient oxygen.

All employees involved with confined space entry are to be fully trained in the use of testing equipment. The pre-entry tests will be for toxic gases (hydrogen sulfide) combustible gases (methane), and oxygen levels. **All confined spaces are to be considered lethal prior to testing.**

If no excessive levels are found, set up ventilator blower, open cover to space and operate blower for 15 minutes before entering.

One person may enter wearing a harness with attached rope and gas detector. A breathing mask with air hose is optional. Continue to operate ventilator blower. Another person (rope person) will secure and hold the rope. He/she is to perform no other duties than monitor the worker below until he/she returns safely. If two or more persons enter a confined space, there will be one individual (rope person) on top for each in the confined space.

If any excessive level of toxic gases is found, the space is not to be entered under any circumstances without the following:

- Contact the supervisor and Maintenance Office immediately by radio or telephone. The supervisor will come to the site or send trained assistance.
- If entry is then a must or an emergency basis, all breathing apparatus (both mask with hose and emergency pack) will be worn along with harness or rope.

The emergency work is to be completed as soon as possible and the location is to be vacated, sealed and locked. This location is not to be re-entered until the atmosphere tests are within safe levels.

III. Contingencies/Variations:

None

I. Procedure Name: **Emergency Rescue**

II. Basic Procedure:

If the entered person becomes unable to return (overcome by gas, falls, heart attack, etc.), the rope person is to secure the end of the line, call for assistance on truck radio and use the winch to immediately lift and remove the employee from the confined space. The rope person is to remain on top with the line secured. At no time is he/she to enter the confined space until trained assistance arrives.

III. Contingencies/Variations:

None

I. Procedure Name: **Annual Training**

II. Basic Procedure:

All Maintenance Services Department employees, i.e., permanent, temporary, substitute and student employees, must be informed annually regarding the following:

Right to Know/Hazard Communication
Bloodborne Pathogens

The subject information is required to be provided for employees within the first 60 days of the school year.

III. Contingencies/Variations:

None

Standard Operating Procedure: **Safety Awareness Program**

Author: MRP

Department: **Maintenance Services**

Issue Date: 12/11/02

SOP #: **02-05-c**

Rev. Date:

I. Procedure Name: **Safety Awareness Program**

II. Basic Procedure:

During each summer break a Safety Awareness Day will be held for all Maintenance Services Department employees. Safety training regarding various subjects will be presented by the Florida Department of Education. Safety awards will be presented for long-term injury free employees at that time.

III. Contingencies/Variations:

Safety Awards presentations are contingent upon available funding through the School District Risk Management Department.



Escambia County
School District
Escambia County Florida



Maintenance Services Department
Policies and Procedures Manual

Section 6
Construction
Projects



***MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL***

TABLE OF CONTENTS

SECTION 6: Construction Projects

- a. Substantial Completion
- b. Project Warranty
 - Attachment #1 – Warranty Request Form*
 - Attachment #2 – Warranty Process Flowchart*
- c. Post Occupancy
 - Attachment #1 – Post Occupancy Memo*

I. Procedure Name: **Substantial Completion**

II. Basic Procedure:

Once a construction project reaches substantial completion, a walk-through inspection is scheduled by the Facilities Planning Department for the Maintenance Services Department to inspect the project and develop a punch list of items that need to be corrected. Facilities Planning to notify the Maintenance Department of such inspection at least three (3) days prior to scheduled inspection date.

The shop Supervisor must submit the punch list items to the Maintenance Department's Administrative Secretary III by email within forty-eight (48) hours after the scheduled walk-through inspection. The punch list items are combined into one document and forwarded to the appropriate Facilities Planning Project Manager to be provided to the project Architect and Contractor. Should a Shop Supervisor not find any punch list items to report, the secretary shall be notified by email within forty-eight (48) hours after the scheduled inspection so that a complete package can be provided to the Facilities Planning Department.

Once the Architect of record verifies that all punch list items are completed, he will notify Facilities Planning in writing. A copy of the letter will be forwarded to the Director of Maintenance Services to be placed in the project file.

If in the process of inspection a Supervisor determines a project, or any portion of a project, is not ready for inspection, the supervisor will notify the Facilities Planning Project Manager by email requesting notification when the project is ready for inspection. The Director of Maintenance shall also be notified.

III. Contingencies/Variations:

None

I. Procedure Name: **Project Warranty**

II. Basic Procedure:

The school district contracts out major construction projects. These projects have a warranty period of one year with the exception of roofing projects. Listed below are the procedures to be followed when reporting warranty issues:

- Maintenance Department performs first response investigation to determine the nature of the problem and whether or not the problem reported is in fact covered under a project warranty. If an employee of the investigating shop is unable to determine if the problem is a warranty issue, the Supervisor shall then contact Facilities Planning Project Manager;
- If item is a warranty issue, Supervisor of the investigating shop submits request to the Maintenance Department Administrative Secretary III by email outlining in detail the project, problem description and any other information as necessary;
- A Contract Warranty Service Request form (see Attachment #1) is prepared and faxed to the appropriate contractor, principal/department head and Facilities Planning Project Manager;
- If the contractor does not provide verification of work completed within the specified time on the Contract Warranty Service Request form, the Supervisor will verify if work has been completed. If work has not been completed, a second request is sent to the contractor. If no response is received to the second request, Facilities Planning is notified.
- The original is filed in the project file.

See Attachment #2 for a flow chart of this process.

III. Contingencies/Variations:

None

**SCHOOL DISTRICT OF ESCAMBIA COUNTY
MAINTENANCE SERVICES DEPARTMENT
CONTRACT WARRANTY SERVICE REQUEST**

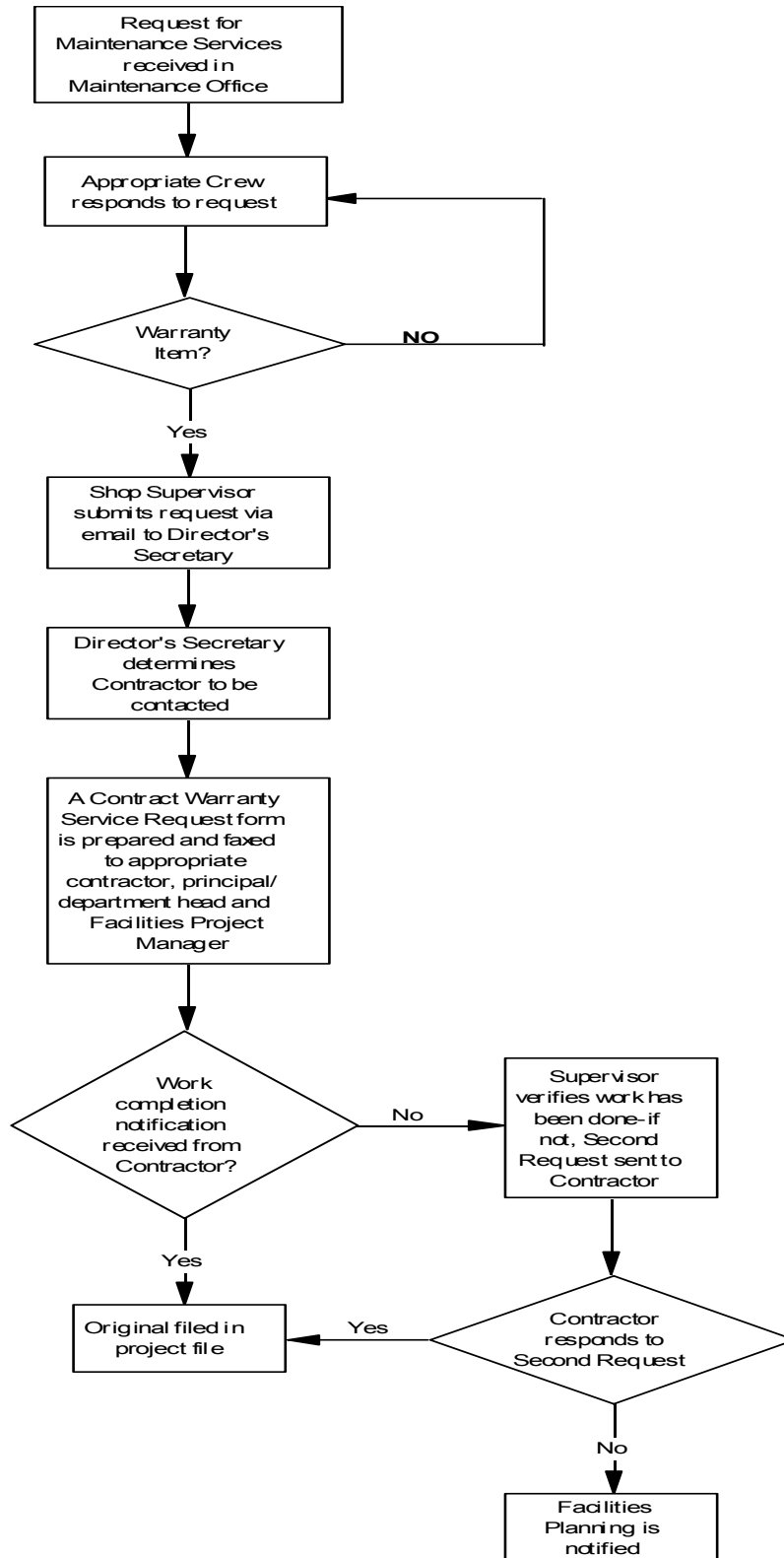
DATE:	
REPORTED BY:	TELEPHONE #:
ISSUED BY:	TELEPHONE #:
	FAX#: 469-5548
PROJECT:	
SCHOOL:	
SCHOOL TELEPHONE #:	
TRADE: <input type="checkbox"/> ELECTRICAL <input type="checkbox"/> MECHANICAL (HVAC) <input type="checkbox"/> PLUMBING <input type="checkbox"/> ROOFING <input type="checkbox"/> ELECTRONICS <input type="checkbox"/> COMPUTER/DATA <input type="checkbox"/> OTHER	
GENERAL CONTRACTOR:	
SUB-CONTRACTOR(S):	
SERVICE REQUEST DESCRIPTION:	
REPAIR TIME _____ Five (5) _____ DAY(S).	
DISTRIBUTION:	
School District Maintenance Department	Fax#: 469-5548
Office of Facilities Planning	Fax#: 469-5634
School Principal:	Fax#:
General Contractor:	Fax#:

Date Repaired: _____

Action(s) Taken: _____

If no action taken, explain why: _____

Project Warranty Process



I. Procedure Name: **Post Occupancy**

II. Basic Procedure:

The School District Facilities Planning Department is responsible for scheduling post occupancy walk through inspections for major new construction and renovation projects approximately 11 months into the warranty period of a construction project. The status of pending warranty items are reviewed by the Director of Maintenance or his representative at that time to insure all warranty request items are completed prior to the end of the warranty period.

Outstanding warranty items identified during the post occupancy walk through inspection will be submitted to Facilities Planning requesting assistance (see Attachment #1).

III. Contingencies/Variations:

None



THE SCHOOL DISTRICT OF ESCAMBIA COUNTY

MAINTENANCE SERVICES DEPARTMENT
30 EAST TEXAR DRIVE
PENSACOLA, FL 32503
PH.850/469-5586, FAX 850/469-5548
<http://www.escambia.k12.fl.us>

JIM PAUL, SUPERINTENDENT

MEMORANDUM

TO: Director – Facilities Planning

FROM: Director – Maintenance Services

DATE:

RE: Post Occupancy Inspection –

At the post occupancy inspection for the above referenced project I took the opportunity to follow up on requests previously submitted for warranty services. These requests were previously sent to the contractor and your office during the warranty period. Please find below a list of items I have verified that have not been corrected and the date submitted:

- All items have been corrected.
- Below is list of items that need to be addressed:

I am requesting your assistance in having these warranty items corrected.

If you have questions or require additional information, please do not hesitate to contact me.

CMP/shp

c: Assistant Superintendent – Operations
Assistant Director – Maintenance Services

Attachment #1
02-06-c



Escambia County
School District
Escambia County Florida



Maintenance Services Department
Policies and Procedures Manual

Section 7
Disaster and
Emergency



**Escambia County
School District**
Escambia County Florida



***MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL***

TABLE OF CONTENTS

SECTION 7: Disaster and Emergency

- a. Declared State of Emergency
- b. Bomb Threat
 - 1. Bomb Threat to Maintenance Office
 - 2. Bomb Threat to School Site
- c. Nights & Weekend Emergency
 - Attachment #1 – Emergency Duty Crew Guidelines*
- d. Hurricane/Tropical Storm
- e. Radio Usage After Hours Emergency Duty Crew

Standard Operating Procedure: **Declared State of Emergency**

Author: MRP

Department: **Maintenance Services**

Issue Date: 12/11/02

SOP #: **02-07-a**

Rev. Date: 8/11/05

I. Procedure Name: **Declared State of Emergency**

II. Basic Procedure:

In the event Escambia County is declared a disaster area or a state of emergency exists as determined by the Director of Maintenance Services or his superiors, the following policy will be observed by all Maintenance employees of the Escambia County School District.

Be advised that when emergency conditions exist, any information pertaining to the Maintenance Department and the employees will be broadcast over WEAR TV (Channel 3), WCOA 1370 AM, and WUWF 88.1 FM.

Employees will be assigned tasks to perform not necessarily relating to their job descriptions.

Each disaster site will have one supervisor in charge of that site from which all personnel will receive their orders. That supervisor will receive his orders from either the Director of Maintenance Services or his superiors.

In the event Escambia County is declared a disaster area or a state of emergency exists the following will be work priorities for Maintenance shops:

Carpentry Shop - Roof inspections and repair; repair windows.

Electrical Shop - Downed power lines and power outages.

Electronics Shop - Repair fire alarms and intercoms.

Grounds Crew - Clear debris from school sites.

Heating & Air Shop - Address freezer/cooler units; entire schools without air conditioning and isolated air-conditioning problems. Repair kitchen equipment and relight pilot lights in conjunction with Energy Services of Pensacola.

Plumbing Shop - Repair broken water lines and damaged wastewater treatment plants.

It will be the responsibility of the disaster site supervisor to maintain an accurate record of the personnel used at that site, the amount of hours spent at that site, equipment used, vehicle number, and amount of mileage incurred in correcting damage to that site. All work orders will have a suffix letter added to the work order number, identifying the disaster.

III. Contingencies/Variations:

None

I. Procedure Name: **Bomb Threat to Maintenance Office**

II. Basic Procedure:

Telephone all shops and instruct them to lock and secure work area and to post sign indicating return time.

The Dispatcher or shop Supervisor should radio crews advising them of the bomb threat and to not return to the shop until instructed by the Maintenance Dispatcher or Supervisor.

Post signs at each entrance to Maintenance Office indicating nature of emergency and an approximate time for them to return.

Lock all doors to office area - rooms 401, 401D, 401G, 401J.

Leave the building.

III. Contingencies/Variations:

None

I. Procedure Name: Bomb Threat to School Site

II. Basic Procedure:

The Maintenance Services Department is to be notified of the bomb threat immediately by the Superintendent's Office. The Maintenance Dispatcher will notify the Locksmith Shop Supervisor so that keys can be delivered to bomb threat site.

The Maintenance Dispatcher will then notify all other Supervisors to insure that no maintenance employees are dispatched to the bomb threat site until further notice.

When an "all clear" message is received, the Maintenance Dispatcher will notify all Supervisors.

It is the responsibility of the Maintenance Department to provide water and have portable toilet facilities delivered to the bomb threat site as instructed by the Assistant Superintendent of Operations.

Ten water kegs and cups are kept in a secure area until needed. When needed, they will be filled with ice and water and delivered to the bomb threat site.

The Director of Maintenance Services will identify a shop for this duty upon notification that a bomb threat has been received. Once the "all clear" notification has been issued, the kegs will be returned to the Maintenance Services Department to be emptied of remaining water/ice, cleaned and secured.

If portable toilet facilities are needed, the Director or Assistant Director of Maintenance Services will procure these services.

III. Contingencies/Variations:

None

Standard Operating Procedure: **Nights & Weekend Emergency**

Department: **Maintenance Services**
SOP #: **02-07-c**

Author: MRP / GLG
Issue Date: 12/11/02
Rev. Date: 1/18/2019

- I. Procedure Name: **Nights & Weekend Emergency**
- II. Basic Procedure:

The Maintenance Department provides emergency night and weekend services to schools and offices with the School District. A response team is created annually in accordance with the Master Contract. A rotation schedule is prepared and distributed to key personnel. If an emergency situation occurs, the appropriate person on call for that week is contacted via the maintenance emergency telephone number (554-4221). A new person is on call beginning each Wednesday afternoon and rotates off the following Wednesday morning. (See Attachment #1)

When an emergency call requires any Maintenance employee to report to the physical location of the emergency, all responding Maintenance employees should dress in uniform, if possible and practical.

- III. Contingencies/Variations:

Refer to SOP # 02-03-a2 for uniform related requirements.

Emergency Duty Team Guidelines

Emergency response is a very important service that we provide for our customers. I would like to take this opportunity to express what is expected from the employees who are chosen for this duty.

If you are selected, you will be committed to a complete one-year period starting in November of the current year. You will be required to drive your work vehicle to and from work so that you will be able to respond to emergency situations at all times. The primary on call person will provide initial response when contacted. At that time, the primary person should respond to and correct as many situations as possible before contacting other employees on the emergency roster. The primary on call responsibility will be rotated on a weekly basis. If the primary on call person needs assistance, you will be the first person contacted if the emergency involves your particular classification.

It will be necessary for you keep your radio turned on during off-hours so that you will be available if the primary person needs assistance. If you are out of town or unable to respond to an emergency call, it is your responsibility to notify the primary on call person in advance. It is essential that you can be easily contacted and that you respond expeditiously when contacted. Any Maintenance employee who must report to the physical location of the emergency should arrive on scene in uniform, if possible and practical.

If for any reason you are unable to be on-call during your scheduled days, you are required to let the Director of Maintenance know the name of the person who will be taking your shift as soon before your scheduled shift begins.

If, during your scheduled duty time, a problem arises that will prevent school from opening or causes safety concerns, you should contact the Director of Maintenance for guidance.

The make-up of the roster positions will be determined by the Director of Maintenance based on the type and number of after-hours emergency calls. If a sufficient number of applications are not received from individuals in the shops that have the most emergency calls, the Director of Maintenance will then consider other classifications. Classification seniority will be the deciding factor for all positions designated by the Director of Maintenance.

These requirements will be made a part of the Maintenance Department Policies and Procedures Manual.

Attachment #1
02-07-c

Standard Operating Procedure: **Hurricane/Tropical Storm**

Department: **Maintenance Services**
SOP #: **02-07-d**

Author: MRP
Issue Date: 12/11/02
Rev. Date:

- I. Procedure Name: **Hurricane/Tropical Storm**
- II. Basic Procedure:

In the event of an approaching tropical storm or hurricane, the Director of Maintenance would take appropriate action according to the Maintenance Hurricane Preparedness Plan. This plan is revised and updated at the beginning of each hurricane season. Each shop is issued a hurricane plan and receives yearly revisions. A master copy of the hurricane plan is kept in the office or at www.escambia.k12.fl.us/adminoff/maint/maintser/hurricane/hurrican.htm

- III. Contingencies/Variations:

None

Standard Operating Procedure: **Nights & Weekend Emergency**

Author: MRP

Department: **Maintenance Services**

Issue Date: 11/26/07

SOP #: **07-07-e**

Rev. Date:

I. Procedure Name: **Radio Usage After Hours Emergency Duty Crew**

II. Basic Procedure:

Serving on the after hours Emergency Duty Crew is a privilege as this is a very important service the Maintenance Department provides to the District.

1. Employees selected to serve on this crew will be required to keep their radios turned on during off hours (24 hours, 7 days per week) in order to be available if the primary on-call person needs assistance.
2. The G.P.S. system on each Emergency Duty Crew radio will be disabled after 3:30 p.m. each day. If a crew member is called out on an emergency call, it will be the responsibility of that crew member to log into the G.P.S. system when the job starts and log out when the job is complete. This information will be used to compile work time.

III. Contingencies/Variations:

None



Escambia County
School District
Escambia County Florida



Maintenance Services Department
Policies and Procedures Manual

Section 8
Permits,
Inspections and
Code Compliance



MAINTENANCE SERVICES DEPARTMENT
POLICIES & PROCEDURES MANUAL

TABLE OF CONTENTS

SECTION 8: Permits, Inspections and Code Compliance

a. Maintenance Permits and Inspections

Attachment #1 – Building Inspections Permit Process Flowchart

Attachment #2 – Sample Permit

Attachment #3 – Sample Permit Application

Attachment #4 – Sample Permit Receipt

Attachment #5 – Sample Work Request Requiring Permit

b. Fire Alarm Off-Site Monitoring

c. Generator Operation and Maintenance Procedures

Attachment #1 Emergency Generator Locations

I. Procedure Name: Maintenance Permits & Inspections

II. Basic Procedure:

The Florida Building Code requires that certain types of repair work require permitting and inspection. Our local building officials, the Escambia County Building Inspections Department and the City of Pensacola Inspections Service perform permitting and inspection services. (see Attachment #1)

1. The Supervisors of the following shops are licensed to apply for permits in their respective trades only for work that is done exclusively by the Maintenance Services Department at district-owned facilities.

Heating & Air Shop – Gas and Mechanical
Carpentry Shop – Building
Electrical Shop – Electrical
Electronics Shop – Electrical
North End Shop – Plumbing, Mechanical, Electrical and Building
Plumbing Shop – Plumbing

Only licensed employees are allowed to apply for a permit.

2. Once it is determined that a permit is required a permit application form is submitted by the Supervisor to the appropriate building official. Applications for permits for maintenance work in the city limits are submitted to the City of Pensacola Inspections Service. Applications for permits for work in Escambia County are submitted to the Escambia County Building Inspections Department. The application (Attachments #2 and #3) can be faxed or hand carried.
3. The building official issues a permit that is returned to the Supervisor along with a permit receipt (Attachment #4). The permit receipt is an invoice and should be processed as any other invoice according to departmental policy (see Maintenance Department policy 02-04-c5). Work can begin once the permit is issued.
4. Once the permitted work is substantially complete (before being covered up etc.) the Supervisor notifies the appropriate building official trade specific office to request an inspection. Example: Plumbing inspection is requested to the plumbing inspectors' office.

Standard Operating Procedure: **Maintenance Permits & Inspections**

Author: MRP

Department: **Maintenance Services**

Issue Date: 12/11/02

SOP #: **02-08-a**

Rev. Date: 9/5/06

I. Procedure Name: **Maintenance Permits & Inspections**

II. Basic Procedure: continued

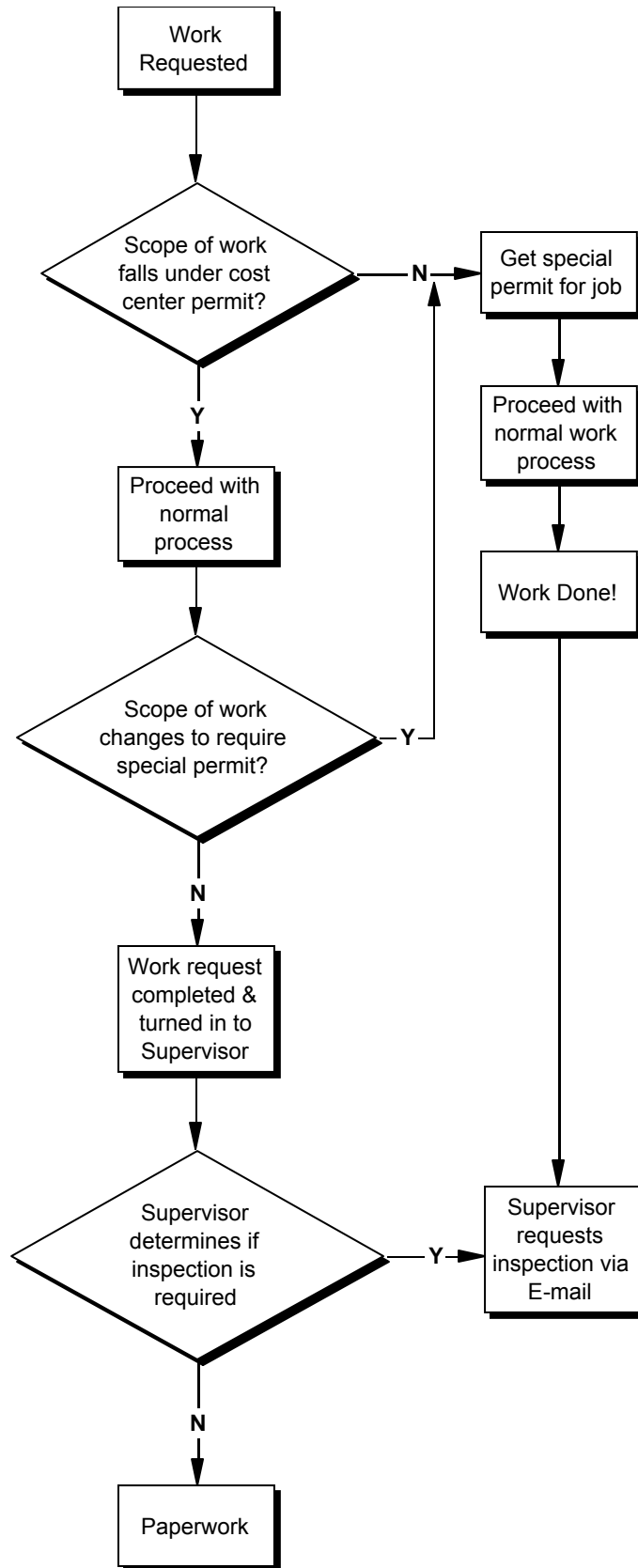
5. After the work passes inspection, the job can be completed and the work request can be filled out and signed off with invoices (including the permit receipt) attached and initialed by the Principal or designee as usual. (See Attachment #5)
6. If it is determined after work begins that a permit is required, the work should stop and the permit process followed.
7. If emergency repairs are needed that require a permit the Supervisor will notify the building official as soon as possible of the situation. The Supervisor will request the permit once the emergency situation is rectified.

III. Contingencies/Variations:

1. In the absence of the licensed Supervisor, the Assistant Director and/or the Director are licensed to apply for permits in all trades (Plumbing, Mechanical, Building, Gas and Electrical).

Standard Operating Procedure: Maintenance Permits & Inspections

Building Inspections Permit Process



Attachment #1
02-08-a

Standard Operating Procedure: Maintenance Permits & Inspections



**ESCAMBLA
COUNTY**

BUILDING SAFETY DIVISION 595-3550
3300 N PACE BLVD SUITE 300
PENSACOLA, FLORIDA 32505
MOLINO OFFICE 587-5770

DB ADDRESS: 3420 PINESTEAD RD
UBDIVISION: NA
LOT: 000 BLOCK: 001
PARCEL NO: 2615305105000001

**** PLUMBING PERMIT ****
PERMIT NO: 0207147P
DATE ISSUED: 07/16/02

(PERMIT): EA BLDG SEWER AS A SEPARATE FE

PRIM. PERMIT NO:
PERMIT TYPE: USE PERM

USE TYPE: ALT:COMM

FIXTURES: 1

APPR'D BY:

TANK/SEWER NO:
VAC BRK/BKFL PREV.:
SEWER/WATER LATERALS:
WATER/FIRE MAINS:
HEATER CHANGE OUTS:
FIRE CABINETS:
CATCH BASINS:

LAWN SPRINKLER SYSTEMS:
MANHOLES:
SWIMMING POOLS:
FIRE HYDRANTS:
STANDPIPE SYSTEMS:
LIFT STATIONS:
STORM DRAINS:

Jamie Futed
8-7-02

OWNER
APPLICANT

WEDGEWOOD MIDDLE SCHOOL
WEDGEWOOD PARK
PENSACOLA FL 32505
PHONE

TOTAL FEES: \$35.00

DIRECTIONS / REMARKS:
WEDGEWOOD MIDDLE SCHOOL/HY 29 WEST ON PINESTEAD
N ON WAGNER T/L INTO SCHOOL

SCHOOL BOARD

REPLACE SEWER LINE

PENSACOLA, FL
PHONE

WARNING TO OWNER: YOUR FAILURE TO RECORD A NOTICE OF COMMENCEMENT MAY RESULT IN YOUR PAYING TWICE FOR IMPROVEMENTS TO YOUR PROPERTY. IF YOU INTEND TO OBTAIN FINANCING, CONSULT WITH YOUR LENDER OR AN ATTORNEY BEFORE RECORDING YOUR NOTICE OF COMMENCEMENT.

I hereby make application for a permit to perform the work described herein and agree that all provisions of the law shall be complied with whether specified herein or not. This permit will expire if no work is started within _____ days or if work is abandoned for a period of _____ days.

NOTICE: All work must be inspected before covering. At least twenty-four hours notice must be given for inspection. In addition to the requirements of this permit, there may be additional restrictions applicable to this property that may be found in the public records of this county, and there may be additional permits required from other governmental entities such as water management districts, state agencies, or federal agencies.

Permittee Signature _____ 180
Donald R. Mayo
Building Official
Issued by _____

INSPECTION	DATE	INSPECTOR	INSPECTION	DATE	INSPECTOR	INSPECTION	DATE	INSPECTOR	INSPECTION	DATE	INSPECTOR

Attachment #2
02-08-a

Standard Operating Procedure: Maintenance Permits & Inspections

Plumbing Installation Application
Escambia County, Florida

Plumbing Permit Number

Street Address <i>3420 Pinestead Rd</i>		Remarks	Data	Setback No	SBIG Permit No																																							
Lot/Block/Subdivision <i>Wedgewood Middle</i>				Tank Approval No	Sewer Tap No																																							
Building/Unit No				<table border="1"> <thead> <tr> <th>FIXTURES</th> <th>1st Floor</th> <th>2nd Floor</th> </tr> </thead> <tbody> <tr><td>Basin</td><td></td><td></td></tr> <tr><td>Bath Tub</td><td></td><td></td></tr> <tr><td>Closet</td><td></td><td></td></tr> <tr><td>Dishwasher</td><td></td><td></td></tr> <tr><td>Drain-Floor/Roof</td><td></td><td></td></tr> <tr><td>Drinking Fountain</td><td></td><td></td></tr> <tr><td>Kitchen Sink</td><td></td><td></td></tr> <tr><td>Sewer/Tank Connection</td><td></td><td></td></tr> <tr><td>Shower</td><td></td><td></td></tr> <tr><td>Washer</td><td></td><td></td></tr> <tr><td>Water Heater</td><td></td><td></td></tr> <tr><td>Sprinkler</td><td>Lawn/Fire</td><td>\$ Heads</td></tr> </tbody> </table>		FIXTURES	1 st Floor	2 nd Floor	Basin			Bath Tub			Closet			Dishwasher			Drain-Floor/Roof			Drinking Fountain			Kitchen Sink			Sewer/Tank Connection			Shower			Washer			Water Heater			Sprinkler	Lawn/Fire	\$ Heads
FIXTURES	1 st Floor			2 nd Floor																																								
Basin																																												
Bath Tub																																												
Closet																																												
Dishwasher																																												
Drain-Floor/Roof																																												
Drinking Fountain																																												
Kitchen Sink																																												
Sewer/Tank Connection																																												
Shower																																												
Washer																																												
Water Heater																																												
Sprinkler	Lawn/Fire	\$ Heads																																										
Plumbing Company Name <i>ECSD</i>		Fire Hydrant																																										
Master Plumber	Phone	Man Hole																																										
Owner	Phone	Sewer Main	<i>Replace sewer line</i>																																									
Builder	Phone	Water Main																																										
Journeyman	Res. <input type="checkbox"/> Com. <input type="checkbox"/>	Sewer Laterals																																										
Cost of Construction: (Labor and Materials)	Number of Inspections	Water Laterals																																										
Driving Directions: <i>N. on 29. W on Pinestead. N. on Wagner. left into school</i>																																												
NOTICE: No work shall be commenced until a permit has been secured. All work must be inspected before covering. Each concrete floor job must have the stack-out inspection before walls are closed.																																												
NOTICE: The temperature of mixed water to individual shower and shower/bath combinations in all buildings shall be controlled by a scald preventive valve of the pressure balancing or thermostatic or combination mixing valve type. Handle position stops shall be adjusted in accordance with manufacturer's instructions at time of installation to a maximum mixed water outlet temperature of 120°F (48.9°C).																																												
I hereby make application to perform the work as described herein. All provisions of the Law shall be complied with whether specified herein or not.																																												
Master Plumber/Applicant - Signature <i>Don Abge</i>		State Reg./Certificate # <i>SBMP004</i>																																										

On the reverse of this sheet (or attached sheets) draw a plan of the proposed installation. Include in the drawing both the plan and elevation of all soil, waste, and vent pipes and include the specifications, dimensions, and material for each.

Plumbing Installation Application

Standard Operating Procedure: Maintenance Permits & Inspections

ESCHAMBA COUNTY - * LIVE *

Item 1 of 1

PERMIT RECEIPT

OPERATOR: Imbrow
COPY # : 1

Sec:26 Twp:1S Rng:30 Sub: Bk:001 Lot:000
PARCEL ID : 261S30S10500001

DATE ISSUED..... : 07/16/2002
RECEIPT #..... : 167908
REFERENCE ID # ... : 02071472

Jami Futeh
8-7-02

SITE ADDRESS : 3420 PINESTEAD RD
SUBDIVISION :
CITY : PENSACOLA
IMPACT AREA :

OWNER : WEDGEWOOD MIDDLE SCHOOL
ADDRESS : WEDGEWOOD PARK
CITY/STATE/ZIP ... : PENSACOLA, FL 32505

RECEIVED FROM : ESL SCHOOL BOARD
CONTRACTOR : INGE DON LIC # 38MP004
COMPANY : SCHOOL BOARD
ADDRESS :
CITY/STATE/ZIP ... : PENSACOLA, FL
TELEPHONE :

FEE ID	UNIT	QUANTITY	AMOUNT	PD-TO-DT	THIS REL	NEW
PPFAXSURCH	FLAT RATE	1.00	1.00	0.00	1.00	
PPSEWERDOM	FLAT RATE	1.00	34.00	0.00	34.00	
TOTAL PERMIT :			35.00	0.00	35.00	

METHOD OF PAYMENT	AMOUNT	NUMBER
ESCROW	35.00	ESLW000294
TOTAL RECEIPT :		35.00

CONT ID : ESLW000294 CURRENT ESCROW BALANCE AS OF 07/16/2002: 465.00

VOICE ID	DESCRIPTION	VOICE ID	DESCRIPTION
501	PLUMBING ROUGH		

Attachment #4
02-08-a

Standard Operating Procedure: Maintenance Permits & Inspections

THE SCHOOL DISTRICT OF ESCAMBIA COUNTY
 MAINTENANCE SERVICES
 30 E. TEXAR DRIVE - 469-5586
 REQUEST FOR MAINTENANCE SERVICES

Work Order #300105
 Date Entered: 07/08/2002
 Req. Complete Date: 08/15/2002
 Time: 11:53

INSTRUCTIONS: Specify details, as you can determine in the space "The Following Services are needed:" If a condition imperils pupil safety or health, telephone the maintenance department immediately and complete this form. Describe the condition that merits attention.

SCHOOL OR SITE 0591 WEDGEWOOD MIDDLE
 LOCATION OF PROBLEM: GROUNDS
 CONTACT NAME AND TELEPHONE: PL SHOP - DON

TYPE OF SERVICE
 Other

THE FOLLOWING SERVICES ARE NEEDED:

REPLACING SEWAGE LINE AND INSTALL MAN HOLE

ANALYSIS OF MATERIALS AND LABOR ESTIMATES
 MATERIALS _____

SHOP ASSIGNED: PL

PO NUMBER	WHSE REQ NO	MAT USED	DESCRIPTION	TRADES	HOURS
				John Doe 1	46-769.60
				John Doe 2	16-263.04
				John Doe 3	8-118.16
				John Doe 4	24-291.12
				John Doe 5	8-77.44
				John Doe 6	16-268.32
				John Doe 7	8-77.44

MINOR ITEMS FROM TRUCK _____

TOTAL HOURS 120

VALUE \$ 1865.12

TOTAL MATERIAL \$ _____

The service requested cannot be completed for the following reasons: (22)

AUG 15 2002

JK

The Work requested was completed by ___/___/___ Principal Dept Head Signature

Date 8-7-02

Mark Pursell

Computer Generated Form
 Oasis/OPS1

Attachment #5
 02-08-a

Standard Operating Procedure: **Fire Alarm Off-Site Monitoring**

Author: CMP

Department: **Maintenance Services**

Issue Date: 9/5/06

SOP #: **06-08-b**

Rev. Date: 8/7/07

I. Procedure Name: Fire Alarm Off-Site Monitoring

II. Basic Procedure:

Off-site monitoring of the district's fire alarm system is required by the Florida Building Code for all projects which involve new construction and major remodeling/renovations which impact the existing fire alarm system.

The existing or new fire alarm system will communicate through a phone dialer cross connected to the existing telephone system to call a pre-programmed phone number at the Escambia County Emergency Operations Center (EOC). Contract requirements are outlined in the district's Standard Technical Specifications, Division 16722.

The district utilizes designated fire alarm contractors as a sole source for work described in the district's Standard Technical Specifications, Division 16721 – Multiplexed Intelligent Fire Alarm Systems. Depending on the system, the designated fire alarm contractor will be one of the following: Ivanco, Koorsen Fire and Security, Advanced Control Concepts or Simplex-Grinnell.

Primary and secondary phone line disembarkation/termination from the phone backboard to be determined by the telecommunications manager or designee.

All dialers will be manufactured by Silent Knight and will be U.L. Listed to communicate with Silent Knight 9000 receivers located at the Escambia County Emergency Operations Center (EOC) with SIA 20 Format only – NO EXCEPTIONS. Dialers will report alarms by zone/building, if possible, common trouble and common supervisory.

Dialer Check-in Time: 8:00 a.m. – 12:00 p.m., Monday – Sunday

Primary: 476-9470

Secondary: 476-9545

Account Number: TBA by ECSD Electronics Dept. – (850)469-5477

A detailed zone description including walking directions from primary entry to fire alarm panels shall be provided to EOC Dispatchers.

EOC Dispatchers will contact School District of Escambia County personnel at the following numbers for specified events:

Standard Operating Procedure: **Fire Alarm Off-Site Monitoring**

Department: **Maintenance Services**
SOP #: **06-08-b**

Author: CMP
Issue Date: 9/5/06
Rev. Date: 8/7/07

- I. Procedure Name: **Fire Alarm Off-Site Monitoring**
- II. Basic Procedure: continued

Activated Fire Alarms – Daytime (0630 – 1530):

- 1. Maintenance
 - a. Dispatch 1 – 469-5469 (Primary)
 - b. Dispatch 2 – 469-5468 (Alternate)
- 2. District Security & Safety Ops:
 - a. Steve Sharp – 554-4589 (Primary)
 - b. Tobin Faciane – 554-5079 (Alternate)

Trouble Alarms – Daytime (0630 – 1530):

- 1. Maintenance
 - a. Dispatch 1 – 469-5469 (Primary)
 - b. Dispatch 2 – 469-5468 (Alternate)

Activated Fire Alarms – Nighttime (1530 – 0630) & Weekends/Holidays:

- 1. Maintenance
 - a. Emergency On-Call – 438-0701 (Primary)
 - b. Electronics Technician On-Call – 554-4190 (Alternate)
- 2. District Security & Safety Ops:
 - a. Steve Sharp – 554-4589 (Primary)
 - b. Tobin Faciane – 554-5079 (Alternate)

Trouble Alarms – Nighttime (1530 – 0630) & Weekends/Holidays:

- 1. Maintenance
 - a. Emergency On-Call – 438-0701 (Primary)
 - b. Electronics Technician On-Call – 554-4190 (Alternate)

Note: It will only be necessary to contact either Dispatch 1 or Dispatch 2 on Maintenance List during weekday daytime hours.

Note: It will only be necessary to contact first person on Security & Safety Operations List.

Standard Operating Procedure: **Fire Alarm Off-Site Monitoring**

Author: CMP

Department: **Maintenance Services**

Issue Date: 9/5/06

SOP #: **06-08-b**

Rev. Date: 8/7/07

- I. Procedure Name: **Fire Alarm Off-Site Monitoring**
- II. Basic Procedure: continued

For test scheduling, call:

Escambia County EOC:	471-6300
Point of Contact:	any Dispatcher
Administration:	Bob Boshen

- III. Contingencies/Variations:

Off-site monitoring is not required for the placement of portables or renovation projects that do not impact the fire alarm system.

Fire alarm will be stable for 30 days before monitoring will begin.

I. Procedure Name: Generator Operation and Maintenance Procedures

II. Basic Procedure:

1. All School District emergency generators will be exercised one time per week. The generators located at the Pace Boulevard Administration Building (Pace Building) will be exercised every Tuesday at 8:00 a.m. for 15 minutes (engine only). See Attachment #1 for a current list of all School District emergency generators and their locations.
2. All School District generators will be serviced by the approved contractor on a bi-annual basis (December/January and July/August).
3. Load testing:
 - a. A load test will be performed on each generator on a yearly basis.
 - b. The generators located at the Pace Building will be load tested one time per month. This test will be performed manually by the School District's Electrical Shop on the first Tuesday of every month.
 - c. Elevator generators will be load tested by the contractor one time per year. Monthly testing will be performed by the School District's Electrical Shop on the first Tuesday of every month.
 - d. The following items will be checked during the monthly load test on the generators located at the Pace Building:
 1. Voltage
 2. Cycles
 3. Amps
 4. Fuel Level
 5. Hour Meter
 6. Transfer Switch

III. Contingencies/Variations:

None

SCHOOL DISTRICT OF ESCAMBIA COUNTY
EMERGENCY GENERATOR LOCATIONS

<u>LOCATION</u>	<u># OF GENERATORS</u>	<u># OF FIRE PUMPS</u>
Bailey Middle	1	
Beulah Elementary	1	
Blue Angels Elementary	1	
N. B. Cook Elementary	1	
George Stone Vocational	1	
Molino Park Elementary	1	
Northview High	1	
Pensacola High	1	
Pine Forest High	1	
Ransom Middle	1	
Washington High	1	
Weis Elementary	1	
West Florida High	2	
Woodham Middle	1	
Bus Garage-Hall Center	2	
Maintenance Services / Facilities Planning	1	
New Administration Building (Pace Boulevard)	2	
Warehouse	1	1

Attachment #1
10-08-c