

## **FACILITIES SELF-HELP PROGRAM**

### **Introduction**

These regulations are written to assist principals, teachers, staff, PTA's and PTO's, and other community groups that wish to enhance the physical environment of an existing district facility and/or its surrounding grounds. Self-help is an excellent way to accomplish projects that parents and staff identify as a priority for their school. These projects can foster community involvement while stretching the available resources to be able to do more.

The goals of this program are:

1. To foster a sense of local community commitment and ownership as it allows employees, students and the community an opportunity to participate in the efforts to improve their physical environment. Truly schools are and should be a part of the local community. This program can facilitate this by bringing the community together for a common goal, which they can be personally involved in and can feel a sense of accomplishment about.
2. To complement the district's regular funded efforts to address facilities improvements thus stretching the resources to be able to do more. It is not unusual to have more demands than there are resources to address them. Consequently, the maintenance and operations resources are used to address the highest priority needs of the district, often leaving some of the more discretionary items unaddressed. This program allows schools and sites to raise and use other funds and resources for specific projects they want accomplished.

### **Definitions**

**Facility** – A building, and its fixed interior and exterior accouterments; and the grounds around a district building including the landscaping, trees, flower beds, playgrounds, outdoors fields or athletic structures, parking lots and sidewalks, and installed signage. This included installed, fixed furnishings, like counters and cupboards, bulletin boards, blinds, and stage curtains, but does NOT include furniture that is not installed or permanently attached to the structure.

**Project** – An undertaking that involves work being performed and a product produced. A project should include all aspects of the undertaking from planning and design, through complete accomplishment such that there is a complete and useable product.

**Self-Help Project** - A project that enhances the physical environment of an existing district facility and/or surrounding grounds using resources, including funds, labor and/or materials, that have been donated from outside.

**Contracted Service** – Any service, professional or construction, performed on or for district property by a non-district entity for remuneration.

**Funding Estimate** – An estimate for a work that also represents a firm commitment to complete the work within the estimated amount so long as the user does not change the work or scope.

**Non-appropriated funds** – Funds that are typically raised or donated and do not go through the normal district budgeting, allocation and appropriation processes.

**Notice to Proceed** – A conditional approval that can allow some or all work to proceed while other parts are being held in abeyance for further resolution.

## Guidance

Basically, a self-help project is a project that enhances the physical environment of an existing district facility and/or surrounding grounds using resources, including funds and/or labor or other resources, that have been donated. The actual work of a self-help project can be accomplished by any number of means ranging from the originating entity, to a contractor, or the Facilities Department.

Self-help projects may involve district funds and resources to augment donated resources. However, the value of the outside resources should equate to at least half of the value of the project. Funds that are not appropriated through the district’s budget process, like donations, fund raisers, SSA account funds and donated labor, may be used for the “outside resources”. If you are not sure about the appropriateness of a funding source, please contact Budget and Planning.

There is a practical limit as to what should be a self-help project. To be a good self-help project, it should:

- Be easily achievable from both a fund raising and accomplishment point of view.
- Represent a noticeable improvement that benefits the school as a whole.
- Be able to be accomplished within a reasonably short period of time.
- Not violate any existing codes or district guidance.
- Be easily maintainable and not present a future burden.
- Does not present an unfunded mandate upon the district’s General Fund.

Self-help projects can inadvertently have a negative impact various existing or planned systems. Building projects can impact fire and security systems, electrical systems, mechanical systems, plumbing systems, technology wiring, disturbs asbestos materials and/or life, safety and building codes. Additionally, exterior projects may impact underground utilities, sprinkler systems, circulation patterns, drainage and safety, and may present unique problems that increase the risks to students, staff or the public. Some may also require special permits, licenses, and fees. Self-help projects involving electrical, plumbing, heating systems, alarms, security telecommunications or technology infrastructure will not normally be authorized.

Because of the problems mentioned above, it is essential that the Facilities Department be aware of and involved in the planning of all potential projects. This can be initiated

informally to get some starting ideas, by first discussing the project with the Facilities Department persons normally responsible for a particular related function or craft. If there is a desire to proceed with the project, it **MUST** be followed up with a formal request. This is done using a *Facilities Work Order Request*, and a cover memo described further below.

Self-help requests must be submitted to the Facilities Department for review and approval before their accomplishment. The Facilities Department reviews requests for a variety of things including: feasibility, suitability, material requirements, and provides technical information to accomplish the work. If the Facilities Department has materials that are available, they will be provided to help minimize the actual project costs. Additionally, Facilities personnel may be assigned to the project to guide its accomplishment if deemed appropriate and necessary. This is typically done when there is a need for specialized technical assistance or guidance.

**No Self-help project shall begin without the prior written approval of the Director, Facilities or his/her designee.**

A self-help project may involve contracted services in part or for the whole of the project. If contracted services are involved in a self-help project, they must be accomplished through or be approved by the Procurement and Contracting Department prior to their accomplishment. Procurement and Contracting will ensure that facilities self-help work is coordinated with the Facilities Department.

The Facilities Department can be used to accomplish the non-fund raising work of a self-help project on an as available basis. In these cases, the project funds are transferred to Facilities and the work is scheduled and accomplished using Facilities personnel or a contract.

The most effective self-help projects are relatively simple to raise funding for and to accomplish. Projects which can be quickly started, pursued and completed are usually the most successful. Successful projects have a project coordinator who is both knowledgeable in the project and the work, and is committed to being involved throughout the entire project. When self-help projects drag out over an extended period of time the enthusiasm of the volunteers falls off and the project runs into problems. Projects that lack an effective coordinator usually are unsuccessful.

The self-help program is managed by the Director of Facilities.

## **Process**

1. The building manager is typically the first and primary point of contact for a school facility self-help project. This individual usually is the most knowledgeable person at the site, regarding specific aspects of their facilities. They often are aware of potential problems, uses, issues and future projects that may be in the works.

2. Once a proposed self-help project has been formulated, it should be documented and submitted to the Facilities Department in writing for a feasibility review. This is done via a *Facilities Work Order Request*, which is forwarded to the Facilities Department work order desk. Both the building manager's and the school principal's signature are required on the work request. This request should include but is not limited to:
  - a. A statement that it is a "Self-Help" project.
  - b. All details of the project,
  - c. Plans, drawing or sketches if available,
  - d. Specifications if available, and
  - e. Any unique information pertinent to the projects accomplishment or use.
3. A cover letter must accompany the work order. This letter should provide the following information:
  - a. A brief statement of the scope of the project (what is the basic intent and main elements of work),
  - b. Source of labor and/or funding to perform the work,
  - c. Designate the project coordinator for the site, and
  - d. A proposed project completion date.
4. The work order request will be reviewed by the Director of Facilities or designee. The Building manager will be notified typically within 30 business days with the results from the feasibility study and how to proceed. If a project has safety concerns, a safety review should be requested from the district's Safety Office. Facilities may offer to provide materials, additional funding, labor or technical assistance to optimize the opportunity for a successful project. Details that need clarification or change are worked out between the Facilities staff and the originator. When this has been completed a written approval or notice to proceed is issued by the Facilities Department. **NO PROJECT CAN BEGIN UNTIL THIS IS OBTAINED.**
5. The project work is almost ready to begin. The project coordinator takes charge and organizes the final details (especially the materials, tools, volunteers and work schedule). Larger or more complex projects should have a pre-start project review meeting to go over the necessary aspects, coordination and concerns of the work. This pre-start project review meeting is the responsibility of the project coordinator, but Facilities and Safety should be invited for technical input and assistance. Others that may be affected or involved should also be invited. This is often where the final details of the plan are worked out to ensure success.
6. The project work may now begin. The project coordinator oversees the work and liaisons with others as necessary. If a problem is encountered that causes a deviation from the approved project, or requires some technical assistance, the project coordinator will immediately notify the Facilities work order desk. Problems that involve electrical, plumbing,

alarms, mechanical/HVAC (heating, ventilating and/or air-conditioning), security, telecommunications or technology infrastructure systems require an immediate stop of the work that affects these systems until the appropriate assistance or technical advice can be provided. If a safety problem arises, or if there is an accident involving an injury or damage to property, the project coordinator needs to notify the district's Safety Office immediately (phone 520-2262).

7. After the project is completed the building manager will notify Facilities via a memo that provided a completion summary that includes but is not limited to the following:
  - a. Scope of what was accomplished
  - b. Completion date
  - c. Total costs broken down by materials and labor
  - d. "In-Kind" donation totals
  - e. Additional warranties, service agreements, and guaranties
  
8. If the project is to be accomplished by the Facilities Department, a "funding estimate" will be provided during the project review, and arrangements will be made for the funds transfer. Once the funding is received the work will be scheduled for accomplishment. Steps 5 through 7 above are then moot and are waived.

Adopted: January 2002  
Reviewed: March 6, 2012

Cross References:           FE, New Educational Facilities Construction or Remodeling  
                                  FEK, Facilities Self-Help Program  
                                  DJ, Procurement and Contracting